MARKETING & MEDIA Decisions

NOVEMBER 1980 • $3.00

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No end to magazine research squabble page 64

STARTING A NEW SERIES

Growth Markets of America: Seattle page 153

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MARKETING & MEDIA Decisions
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STARTING A NEW SERIES
Growth Markets of America: Seattle

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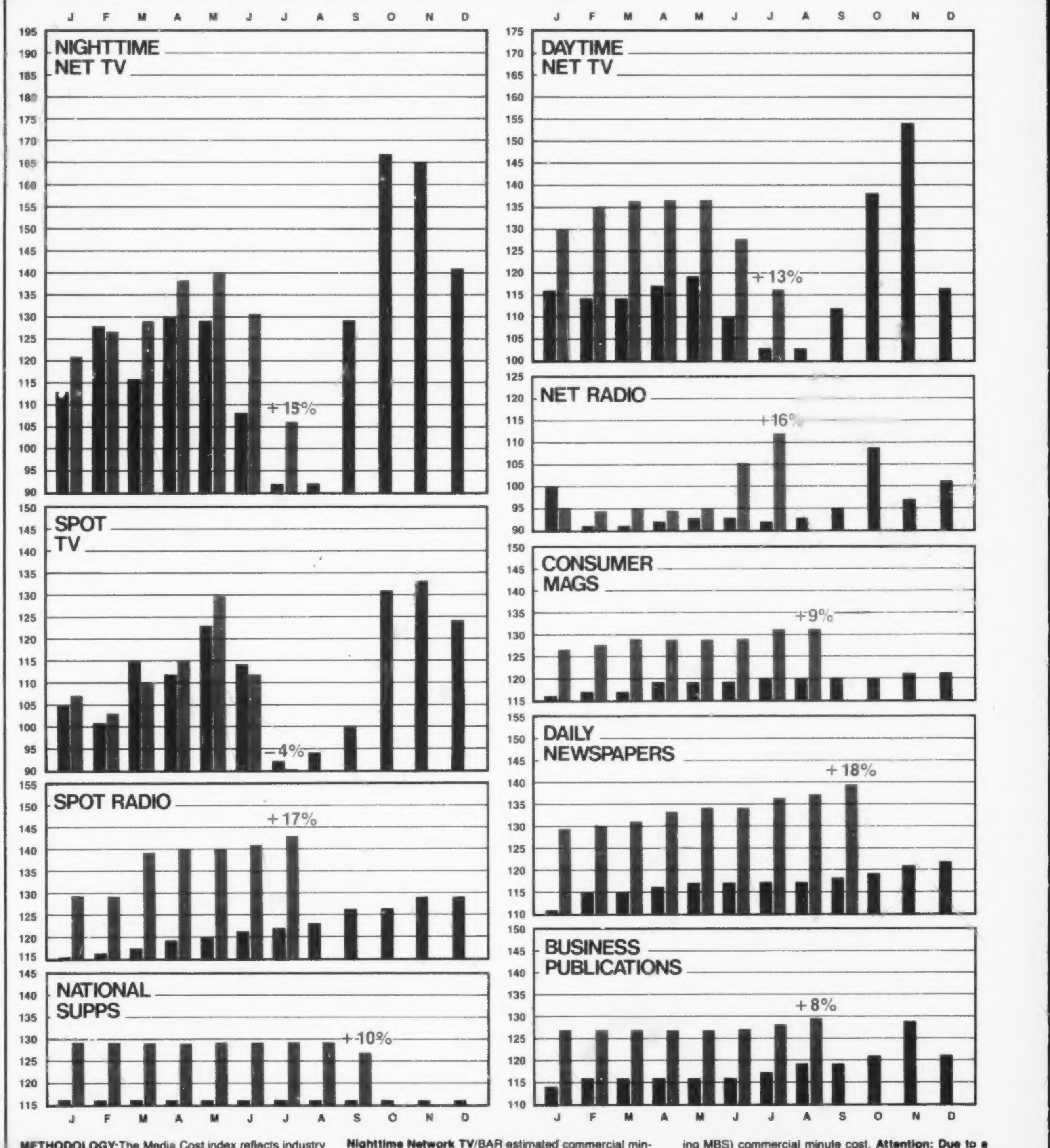
MEDIA COST INDEX

Black bars index for 1979; red bars 1980; base year 1977
Prepared by J. Walter Thompson Media Department



METHODOLOGY: The Media Cost index reflects industry reported trends extracted from available published sources. JWT Media Analysis utilized standard competitive report sources to develop comparable unit costs that reflected monthly cost trends by medium. Where industry competitive sources are unavailable, JWT sampled selected cost data from SRDS. Definition of the sources, universe, and media units used follows: *SOURCES*– **Nighttime Network TV**/BAR estimated commercial minute cost for *all* Night-time Network TV (6 PM to sign-off). **Daytime Network TV**/BAR estimated commercial minute costs for *all* Daytime Network TV (Sign-on to 6 PM). **Spot TV**/BAR CUME National Spot TV Report for estimated commercial minute costs for *all* national and regional Spot TV activity in 75 markets. **Network Radio**/BAR Network Radio Report used to estimate *all* three network (Excluding MBS) commercial minute cost. **Attention: Due to a change in BAR's source for commercial minute cost we are now using Jan. 1979 as a base for new index.** **Spot Radio**/JWT estimates based on reported SRDS cost of one minute on one station per market in the top 50 RADI markets. **Consumer Magazines**/JWT estimates based on reported SRDS cost of a P4/C for 30 national consumer magazines based on circulation. **National Supplements**

Traveler's check war

American Express has dominated the traveler's check market for years. But new entries and revitalized brands are out to dethrone the leader.

For years, American Express has been the undisputed leader in the traveler's check market. But that leadership is being challenged.

Its two largest but distant competitors, Citicorp and Bank of America, are trying to edge up on Amexco's 54% share of the $25 billion market. Citicorp and Bank of America each claim a 12% market share.

But perhaps the most serious threat to American Express is the entry last year of Visa and MasterCard this spring into the traveler's check market.

The attempt to unseat American Express is changing the way traveler's checks are marketed. Traditionally, they have been sold as a safe and convenient alternative to cash. The basic difference between them was the speed and ease of refund if the checks were lost.

The new rivals are changing that. Brand preference and an increased role for advertising are becoming more important.

American Express' $10 million advertising budget, most of it in television, is no longer the outstanding expenditure in the business. Citicorp recently tripled its ad budget to $12 million to increase awareness of its checks, and others are spending more wisely or are considering budget increases.

> **“Citicorp introduced new service in August — check ordering by phone. If it creates new business at a profit, others will try it”**

Another sign of the increased competition is additional services check issuers are introducing to make their traveler's checks more appealing.

Citicorp and American Express may soon offer interest on traveler's checks. Typically, banks and check issuers have shared whatever interest is accumulated from the time the check is purchased until it is cashed.

However, most industry observers doubt that rumors of interest-bearing traveler's checks will become reality, saying that Citicorp is using the idea to hold off competition and that American Express is frowning at the concept.

Paying interest to purchasers is unpopular because it eliminates a good portion of the check issuer's profit. In addition, processing costs might reduce the interest so much that it may not be worthwhile either to the issuer or to the traveler's check holder.

Another new service already in the works is check ordering by phone. Introduced by Citicorp mid-August, the system may give the company's traveler's checks an added bonus.

Customers phones in an order using a special password. Then their signature is electronically printed on the check from a specimen signature held by the bank. The checks are mailed out, and must be countersigned when cashed.

Citicorp's system has come under fire from critics who charge that the system is vulnerable to fraud and theft. They charge that improper signatures could be placed on checks or that checks could be intercepted in the mail.

Citicorp officials, however, have countered that abuse will be no greater than it is under the current system, in which the customer must countersign the checks before leaving the bank where purchased.

Despite the increased competition, observers doubt that anyone will be able to dethrone American Express.

"There isn't anything the competition can do that American Express can't do," said Spencer Nilson, editor of the *Nilson Report*, a credit industry newsletter.

Nilson has projected that American Express will expand its 54% market share to 58% by 1985 while BankAmerica's current 12% share will slide to 6% and Citicorp's 12% share will drop to 7%. For Visa, the relative newcomer to the market, he predicts a drop to 4% in 1985 from a current 7%. MasterCard's future is bright, he

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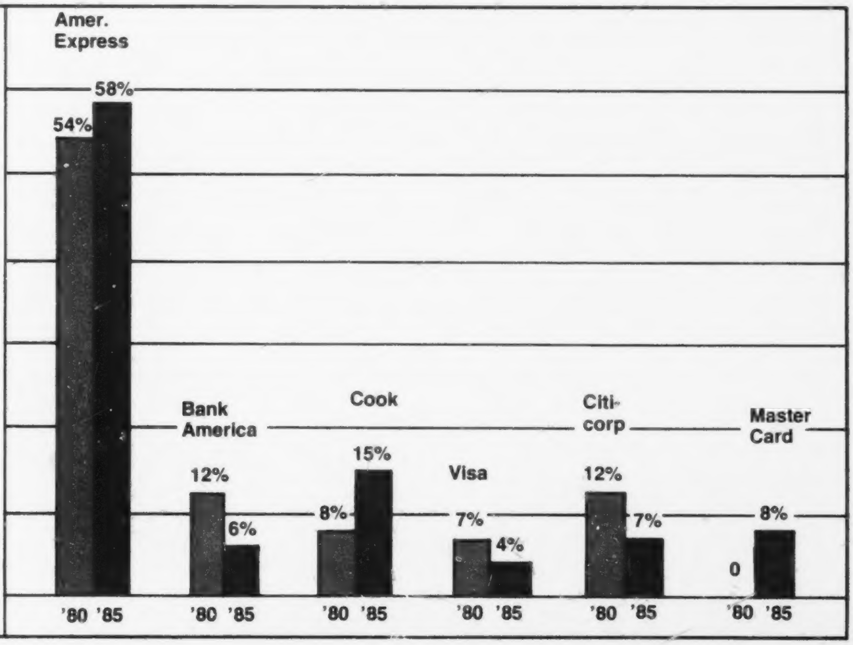
Projected market shares 1980-1985



Market predictions show that American Express will not only continue to dominate the market but expand its share. Other traveler's check contenders will lose strength despite more aggressive marketing. Growth is expected, however, from MasterCard's forthcoming entry into the market. Projections were made by Spencer Nilson, editor of the *Nilson Report*, a credit industry newsletter.

Finding good people starts with the specs

Simmy Sussman, personnel specialist, offers some sound advice to marketing and media people who have a people problem — and who doesn't currently? On facing page, her update of price ranges for key marketing and media jobs in agencies and companies. They haven't changed much since her last report in August 1979, but it's significant that company side salaries are rising fastest.

Staffing is a major problem today all over the country. Whether it is the advertiser looking for people or the advertising agency looking for people, the critical factors are communicating properly with personnel specialists as well as job seekers — and vice versa.

Here is some advice on how best to go about the search for new people, based on my experience as a placement specialist.

It all starts with the company or agency that needs help.

A job requisition will come from either the person responsible for hiring a particular person, or it will come from the personnel department of the corporation or the advertising agency. The most critical part of the job, as far as a good agent is concerned, is getting absolutely clear specs on what is required. It is very important for the person giving the job requisition to the agent, to make their needs as clear as possible so that very little time and energy is wasted.

Each job is unique unto itself. Each description is one that cannot be used in another situation. We are dealing with various people, various personalities, who reports to whom, what type of person is required for the job, what type of personality is required, what kind of business the job pertains to. There are many many factors that are involved in the screening process in order to find the ideal, or as close to ideal, candidate as can be found.

An agent's job is to save the client time.

A key factor in time-saving is for the personnel within the organization, other than the personnel department who are involved. Personnel departments of many corporations and advertising agencies are many times overworked, and it is difficult to determine which jobs take priority. Therefore it is incumbent upon those people who require personnel throughout the company to make their needs known to the personnel department in detail.

Simmy Sussman

In many instances we have seen clients waiting weeks before they, in turn, would see one or two candidates, because the work load of the personnel department is such that candidates who are calling for appointments in Personnel don't get seen for a week or two, and then, before they see the person who is responsible for hiring, a week, two weeks, three weeks, a month could go by. Not only that; in many instances the Personnel Department is doing as good a job as they are capable of doing for their own company, but they truly don't understand each and every intricacy of each and every job.

So, the screening process that may go on from the personnel department may be one that is very important in eliminating some candidates that may be seen by the person doing the hiring, but the person doing the hiring must make their needs known to the personnel department so that they can also do a far more effective job for them.

It is a known fact, however, that when an order is given directly from the person responsible for doing the hiring, whether it is the president of the corporation or any member of management, there is no question that candidates are seen far sooner, and with much more alacrity, than if candidates must go through personnel departments.

That of course is a question of time and one's own priorities. It also is a question of whether or not the company chooses to have their executives involved in the hiring process from the beginning. There are many ways to accomplish the hiring process, but the quickest way is when the person involved in hiring gets involved in the personnel function.

I must say, at this point, that I am not looking to step on anyone's toes in making such a blaring statement as I just have. But it is very important for everyone involved, because the personnel function and the function of finding qualified candidates for each and every company is a giant process in all phases of advertising.

Personnel departments, in many instances, must unblock themselves from corporate paranoia in trying to get this job well done. I am not saying that every Personnel department in every corporation in America is paranoid. But many personnel people are afraid of letting agents work directly within the departments of the company, because agents have been known to abuse this privilege.

The agent's best friend is actually an effective, well-run personnel department. This can be the main conduit for information about job needs. The personnel departments in companies must be very visible within their own organizations. The relationships that they maintain with their executives have to be such that they know every nuance of each and every executive's personality, so that they, in turn, can find right people more quickly for them.

It is also incumbent upon the personnel managers and people in hiring capacities to maintain good relationships with agents throughout the year, because many times one can get good information about a new candidate coming into a marketplace, people who are actively looking throughout the country, that they would not be aware of. ■

Media and marketing salary ranges — October 1980

Major 4A advertising agencies

MEDIA

1. Senior vp-executive director of media operations	$70,000. — $100,000.
2. Senior vp-director of media services	$60,000. — $ 85,000.
3. Vp-director of local broadcast management	$45,000. — $ 70,000.
4. Senior vp-associate media director	$40,000. — $ 55,000.
5. Vp-assistant media director	$35,000. — $ 45,000.
6. Assistant media director	$23,000. — $ 32,000.
7. Vp-buying supervisor	$30,000. — $ 40,000.
8. Buying supervisor	$22,000. — $ 33,000.
9. Director out of Home media	$25,000. — $ 60,000.
10. Media planner	$12,000. — $ 25,000.
11. Media buyer	$14,000. — $ 23,000.
12. Assistant media planner	$ 8,000. — $ 12,000.
13. Assistant media buyer	$ 8,000. — $ 12,000.

MEDIA RESEARCH

1. Senior vp-director	$50,000. — $ 75,000.
2. Associate director of research information	$30,000. — $ 50,000.
3. Media research supervisor	$18,000. — $ 25,000.
4. Media research analyst	$12,000. — $ 18,000.

BROADCAST

1. Senior vp-associate director	$60,000. — $ 90,000.
2. Vp.-associate director	$40,000. — $ 65,000.
3. Vp.-program director	$35,000. — $ 60,000.
4. Account executive	$25,000. — $ 40,000.
5. Syndication specialist	$25,000. — $ 50,000.
6. Broadcast assistant	$12,000. — $ 18,000.
7. Staff assistant	$10,000. — $ 12,000.

COMPUTER APPLICATIONS (MEDIA)

1. Director	$35,000. — $ 60,000.
2. Program & systems supervisor	$25,000. — $ 47,500.
3. Programer	$18,000. — $ 25,000.

Compensation package applicable to those at v.p. title and above includes:

Deferred compensation	$5,000. to $20,000.
Management bonus	$5,000. to $60,000.
Stock options	100 to 2,000 shares
Restricted stock	100 to 1,000 shares

Profit sharing: % depending upon agency from 10% up to maximum.

Other benefits: Company car (new car every two years); club dues, assessments, and expenses fully paid; all medical and dental bills 100% reimbursed; company paid financial advisory service; savings plan — company contributes 20¢ to 50¢ for every $1.00 invested, plus interest.

Major Corporations

1. Vp.-marketing services	$50,000. — $ 85,000.
2. Vp.-advertising services	$32,500. — $ 60,000.
3. Vp.-corporate communications	$35,000. — $ 65,000.
4. Media director	$45,000. — $ 60,000.
5. Associate media manager	$25,000. — $ 45,000.
6. Group head	$22,500. — $ 40,000.
7. Network negotiator	$25,000. — $ 48,000.
8. Manager spot buying	$30,000. — $ 45,000.
9. Media planner/buyer	$11,750. — $ 25,000.

Compensation package applicable to those at v.p. title and above includes:

Bonus	0 to 30% at all levels
Deferred compansation	discretionary
Management bonus	discretionary
Stock options	discretionary

Other benefits: Tuition refund (depending upon corporation); profit sharing, where applicable; 100% medical and dental coverage, when applicable.

Source: Survey by Simmy Sussman

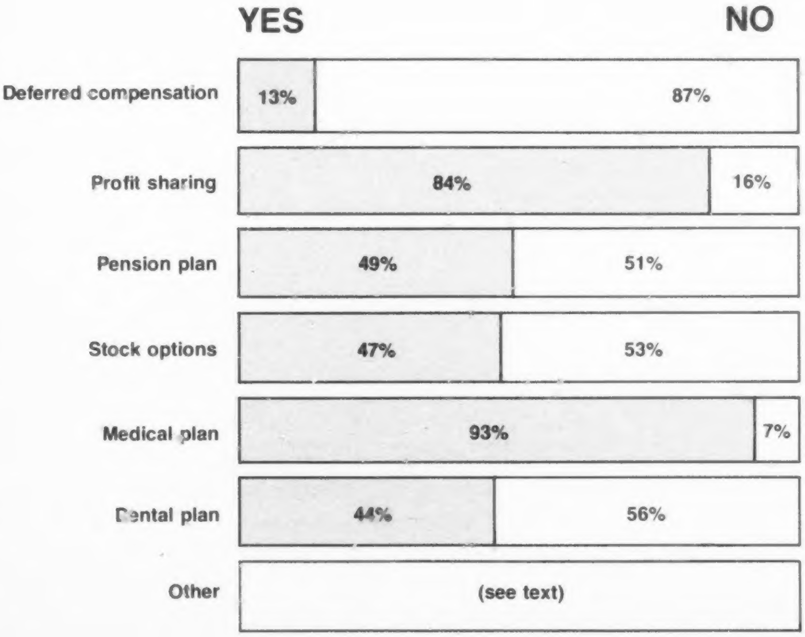
New *Decisions* Jury of Media Opinion

This is the first of a continuing series of survey reports we will publish based on replies from *Marketing & Media Decisions'* newly-developed "Jury of Media Opinion." We have selected as the base of the panel the media directors of those agencies in the upper billing ranges. Any of our media director readers who would like to join are welcome.

Media pay will rise only 10% in '81

First report from new panel of agency media experts puts finger on how media directors price their people. Raises in 1981 won't even keep pace with inflation. To get $30,000 takes 10 years of experience. For additional views on salary trends see preceding report by Simmy Sussman.

Does your agency offer compensation benefits other than salary?



Most people in media departments will be in for a 10% increase in salary next year.

This figure shows up most often in the returns from a questionnaire sent to *Marketing & Media Decisions'* new "Jury of Media Opinion." We wrote to the media directors of approximately 150 agencies in the top income bracket and received 61 usable replies.

The general implication was that the increases indicated were "across the board," but some suggest that the increase was a budget — and not an individual — increase. There are enough agencies contemplating merit raises only to keep media specialists on their toes. Note the following replies:

"If people deserve an increase, they should get it."

"Planned at 10% but I have control to appeal to management for more money to cover individual situations."

"Good people will get at least 10% raises; poor performers will be 'attritioned out.' "

"For overall budget, 8%-10%. However, disbursement by individual is up to me."

"Seven percent — but the method of control is to increase the salary of best people only."

One cogent remark with respect to the salary situation which bears reporting: "The final level will depend upon the percent of media department salary costs to agency revenue — not billing. This is the control used to determine how much is available for media personnel. The more productivity, the larger the increase that can be justified."

Hold-the-liners

Inflation and the government's guidelines show up as control factors, which could be "cop-outs" on the part of management to hold increases to the letter of the law. Responses along this line include:

"Try to stay within guidelines — this is hard since 1980 was within guidelines also."

"About in line with inflation — not controlled by media director."

"Probable 10% to keep up with inflation."

"The economy has a real impact."

"Lesser people get merit raises plus inflation on occasion. Pressure continues to raise salaries despite the economy."

Who's in charge?

Do media directors have any control over increasing salary costs? The answers received from our jury presented a mixed bag of opinion. Here are some of them:

"Have control in *exceptional cases* for those with unusually high contribution levels. Will probably have to live with a flat amount available."

Here is an unusual reply: "We can control the increase only by allowing the more tenured to leave for a new place and promoting juniors. Not the best solution though."

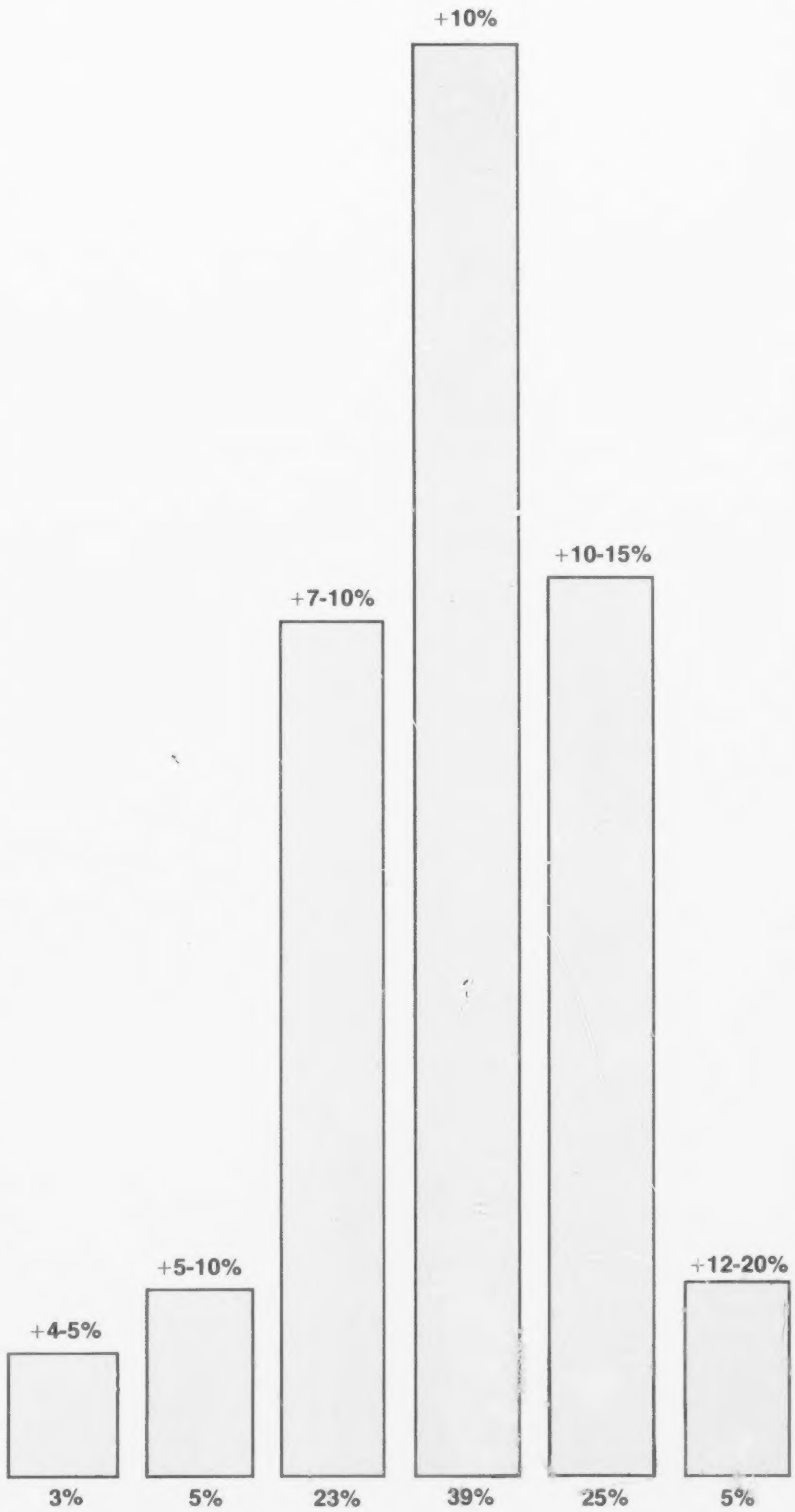
Other replies included:

"My control is basically recommending the raise, and why, to the executive vp. To date, I've had no problem in getting these increments approved."

"My method of control is to increase the salary of the best people only."

"We can't control it too much —

Most respondents expect media salaries to rise 10% in 1981



Percent of respondents in each increase range

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have to keep up with the industry."

"I can't control it — the money people (top management) do."

"I have no control other than determining which individuals receive raises."

And here is a shocker of an answer: "Control is by having fewer people do the work." This fits in with another opinion: "Salaries will increase as media departments keep a lean staff of good professionals."

And let us not overlook this response: "Compensation needs are rising faster than our ability to automate or find shortcuts *to eliminate staff and their salaries*."

"No. I have no control other than determining which individuals receive a raise. The amount is determined by management."

In addition to pay checks . . .

Actual dollars are one thing. But compensation these days includes fringe benefits. The accompanying chart shows this graphically, but here's the gist of what we found.

Deferred compensation showed up in only 13% of the cases. And one can assume that this was available only for the upper echelon. Profit sharing beat out pension plans by a wide margin. Of the agencies responding, 84% said this fringe benefit was given to employees. Pension plans were about evenly divided — 49% yes and 51% no. Stock options (again probably for the top people only) showed 47% yes and 53% no.

Most, but not all, are covered by a medical plan — 93% yes and 7% no. Dental plans have not yet become as popular a fringe benefit — 44% yes and 56% no.

We also asked what "other" fringes were offered: The most often reported were club dues (including association memberships) and company cars (at the top level). Other mentions included parking, year-end bonus, medical prescription plans and savings plan. None, however, were mentioned often. It was expected that life insurance might turn up (although we didn't ask about it specifically) but it did not.

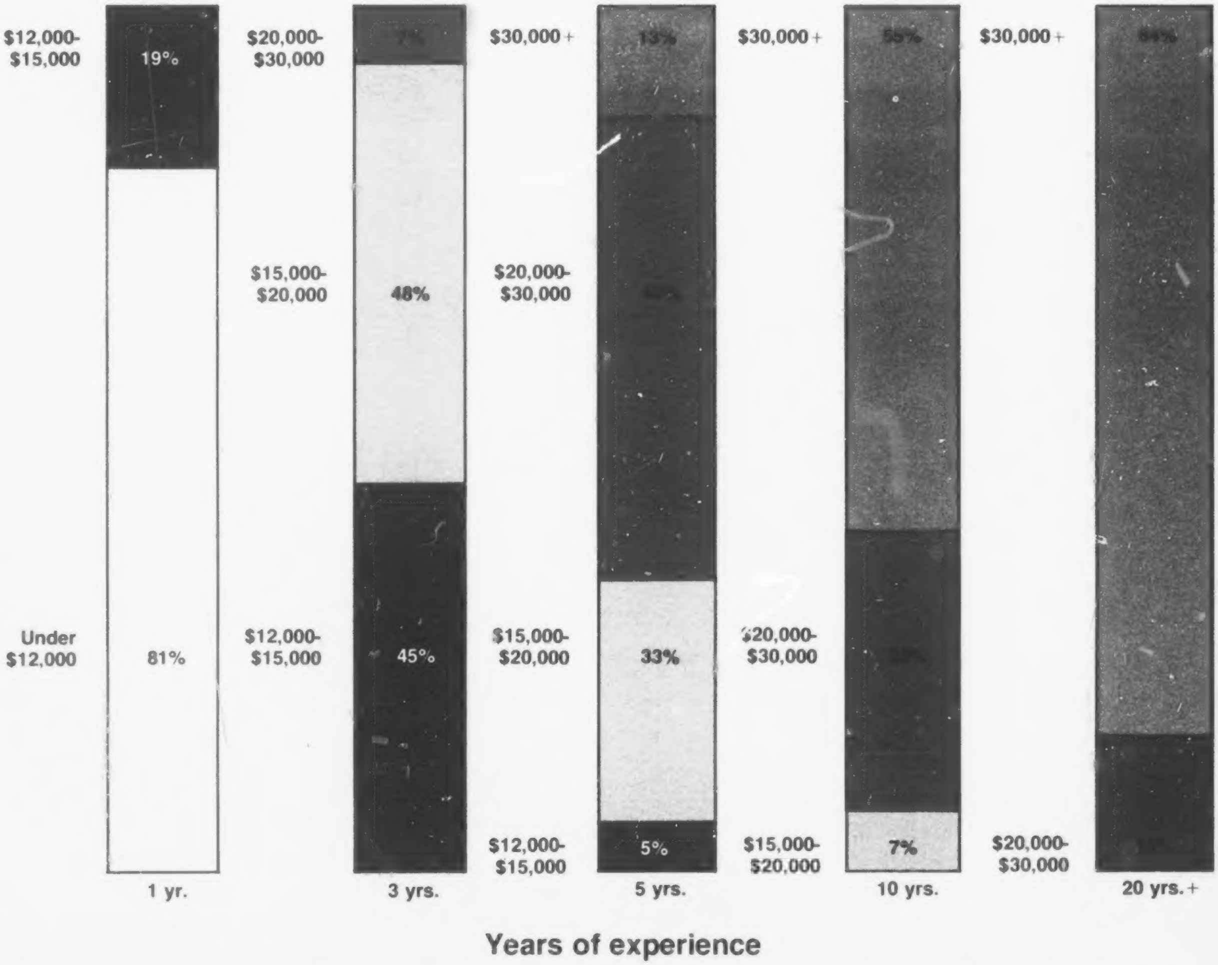
Here are other thoughts along the same line:

"Media salaries have lagged behind creative and account service for some time, but are now beginning to catch up."

"Salaries are inadequate for the re-

Continued on page 134

Percent of media people in each salary bracket by years of experience



SALARIES

(from 76)

sponsibility. But they are increasing with the growing importance and complexity of media."

"They're getting paid higher salaries, and fringe benefits are becoming more prevalent."

"Demands of the business are calling for increased compensation. Fringe benefits should be used more."

"We need to be competitive with account service salaries to retain good people."

And this response reflects on earlier opinions: "Lots more money for fewer, better people."

The positives

Continuing with the responses on the favorable side we have these:

"The compensation levels have increased quite steadily recently. It makes 'paying your dues' more tolerable. All this is encouraging as it has started to draw people who otherwise may have chosen other career alternatives because of disparity in income."

"Media positions have traditionally been on the low side. This is especially true in small-to-middle-size agencies where the media people wear many different hats. Also, there should be some form of compensation when a media professional is responsible for bringing in new business."

But every media director does not see the light at the end of the tunnel as brightly as those quoted previously. To wit: "As has been the case for years, we tend to underpay the brighter young people within the agency and overpay when we hire from outside."

"Still not enough agency management acceptance of the media department's worth/value."

"Agency management still does not regard the media function highly . . . The 4'As averages are the rule."

Cautions for job-seekers

Media people (experienced and beginners) might take a hard look at themselves in the light of the following remarks:

"People being interviewed, regardless of position, are asking for salaries which are inconsistent with their experience and skills."

"Expectations of younger people are unrealistic in terms of present level of expertise." No solution, however, to this problem was offered. It's just something that media directors are worried about these days.

"From what I've seen, specialists are demanding disproportionate compensation levels. Perhaps this is to compensate for their specialty which can leave them out on a limb if there is a situation change."

"We are seeking to emphasize quality over quantity. Many detail tasks have been computerized, eliminating the need for clerical people."

How do media directors look at the need to pay increasingly more for their people? Here are some responses from our panel:

"In order to keep a first-rate staff I find it necessary to pay at the top of the scale."

"The lack of upper middle, middle and top media management could force substantial jumps in salary for qualified personnnel."

"There is a tendency to delay the effective date of the increase. But if people are to be retained, they must be compensated."

Effect of computerization

Here is a comment that negates somewhat the findings about new kinds of people needed in the media department. "Since the advent of the computer in evaluating journals, it seems the more capable, ambitious young people are not attracted to media positions."

But read on and note these extracts from our media director panel.

"Have added a computer specialist."

"Need people to work with computer research."

"Computer-oriented people."

"Increased need for people who feel comfortable with computer hardware and software."

"Will begin looking for people who seek media careers but who also have rudimentary knowledge of data processing."

Worries

Competitive pressures from other agencies or other sources of employment loom heavy on the media director. In general we found that "good people are hard to find" and "you've got to pay to keep them. Their replacement will also cost more." To these comments let us add: "Very good media people are few and far between. Replacements and new hires are at the junior level."

One media director adding to this brought up the point of recognition: "Salaries are increasing rapidly due to the demand against a relatively small supply of people."

"However," he continued, "salaries are still lower than account service for the same number of years of experience and level of contribution. This business still does not invest its dollars proportionately in the media area as it does in account service and in the creative department."

On more than one occasion the value of the media department as a productive function of the agency crept into the replies. The reaction went both ways: "Management is not recognizing media's worth; not considering the contribution of the media department as being valuable.

"The business is increasingly becoming more complex, requiring media expertise to handle the investment of vast sums of money. Account people can't understand the intricacies of media which forces them to rely heavily on media's direction. But media salary levels are not keeping up with media's new importance."

But there is a better story in some of the following remarks about people in general. It may be a sad commentary on the available work force, but this is what several of the media directors we contacted are saying.

"Need people who are willing to work. We are getting too many people who are not willing to put time in required to do a good job."

"Turnover in media personnel costs time, effort and experience. Therefore, to keep talented low-level and experienced upper-level people, salaries are and must continue to be raised quickly; weak personnel are being weeded out quickly. The higher-paid (better) people are being asked to work harder, longer and produce more quality work than ever before."

But, to end on a happy note, one California agency media director said: "I see a trend toward longer vacations sooner, more holidays and faster promotions in terms of title and responsibility." ■

SOUTH BEND Tribune
SHEDS MORE LIGHT

Daily delivers better "ratings" in a market greater than several entire States!

Daily delivers more in any age bracket
66% — 18 – 34
74% — 35 – 49
80% — 50 – 64
79% — 65 and over

Daily delivers more of any income group
79% — $25,000 and over
76% — $15 – 24,999
69% — $8 – 14,999

Daily delivers more at any education level
78% — part College or more
73% — High School graduate
66% — part High School or less

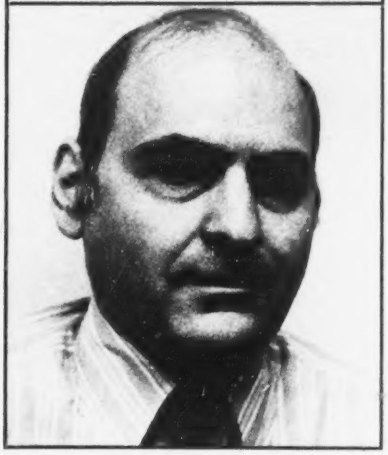
Source: Belden CMS May-July 1979

South Bend Tribune

Albert E. Petersohn, General Advertising Manager
South Bend, IN 46626 • 219/233-6161
Represented by Story & Kelly-Smith, Inc.

AS THEY SEE IT

MEDIOLOGY
by ED PAPAZIAN



Newspapers and shoppers: important area for analysis

In the course of an investigation I was making recently about people's shopping habits, I came across some interesting findings in the 1979 Simmons Market Research Bureau Study of Media and Markets. The data deals with newspapers, and by implication, it seems to support the premise long held by many that this medium has an extra powerful impact on or just before peak shopping days.

In its 1979 study, SMRB asked adults when they normally did their major food shopping (by day of week) and came up with these findings. Approximately one-fourth named no particular day, but the remainder focused sharply on Thursdays, Fridays, and Saturdays (10%, 14% and 14% respectively).

Not surprisingly, the demographics of major food shoppers varied considerably by day of week. For example, the Monday, Tuesday, and Sunday shoppers were much younger and somewhat higher on the socio-economic scale than mid-week shoppers. Indeed, the age, education, and income statistics for adults who do their main food shopping on Wednesdays and Thursdays reveals a predominantly middle-aged and older group as the dominant force, but the pattern changes as we move to Friday and Saturday.

Percent of adults who do their major food shopping on a particular day

MONDAY	3.1%
TUESDAY	2.8%
WEDNESDAY	5.3%
THURSDAY	10.2%
FRIDAY	13.8%
SATURDAY	13.6%
SUNDAY	2.2%
NO USUAL DAY	24.4%

SOURCE: "Day usually shop" from Simmons Market Research Bureau 1979 Study of Media and Markets

Proportion of adults who do their major food shopping on a particular day who read newspapers

	% Reading Daily Papers Yesterday
MONDAY	66
TUESDAY	68
WEDNESDAY	76
THURSDAY	77
FRIDAY	72
SATURDAY	70
SUNDAY	68
NO USUAL DAY	67

SOURCE: "Day usually shop" from Simmons Market Research Bureau 1979 Study of Media and Markets

If one were to examine the above demographics and use simulation methods to predict newspaper readership, there would be little differentiation. The fact that Monday shoppers are much younger than their Wednesday counterparts would be off-set, in part, by their higher incomes and educations. So it is unlikely that one would predict higher or lower newspaper readership based exclusively on such distinctions. Yet, interestingly, when Simmons actually asked the question, differences *did* show up. There is a noticeable peak in daily newspaper readership (more exactly, the previous day's readership.) For adults who do their major food shopping on Wednesdays and Thursdays.

This is the item that really caught my eye — the marked bump in newspaper readership for Wednesday and Thursday food shoppers. It raises intriguing questions. For example, do audience statistics mask a much greater dependency of certain segments of the population on the daily newspaper? The shopping day concept in newspapers is a time-honored tradition most markets have their "best food day" issues packed with ads highlighting sales.

But the advent of weekend shopping and greater involvement by men is an important new element in the modern marketing mix, and the role of the newspaper must be changing to accommodate them. I wonder whether the medium is exploring this area with new research so many of us who were weaned on media in the 1960's and early 1970's can update ourselves about newspapers. And not just dailies.

What about weekend papers? What kinds of readers shop them for what kinds of products? How do various kinds of ads function in these environments? Can the national advertiser, who relies so heavily on tv and magazines to carry his message to the consumer, use newspapers more effectively to tell him when and where to buy his product? What lessons can be learned from retail advertising on this score?

I know I'd be interested, and I'm sure that a lot of others would be, too. ■

Demographic composition of adults who do their major food shopping on a particular day

	% Female	% 18-34	% 50+	% 1+ Yrs. College	% 25,000+ Income
MONDAY	69	45	37	35	25
TUESDAY	60	41	38	33	24
WEDNESDAY	70	30	48	26	18
THURSDAY	68	29	48	29	26
FRIDAY	68	34	40	24	22
SATURDAY	60	39	33	29	27
SUNDAY	60	50	27	37	33
NO USUAL DAY	61	44	33	36	26

SOURCE: "Day usually shop" from Simmons Market Research Bureau 1979 Study of Media and Markets

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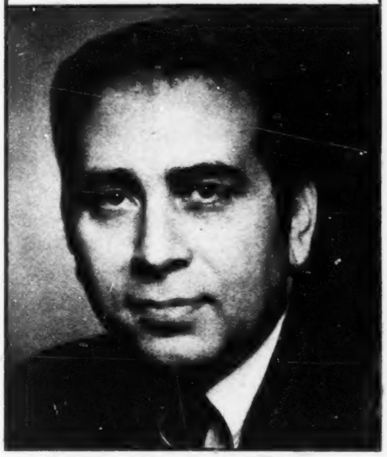
MARKETING
by JOSEPH OSTROW
exec. vp-director of communications services, Young & Rubicam.



Media is for dullards

The enormous attention that is being showered upon the new electronic media along with other media developments that are anticipated during the 1980's serve also to put a sharper focus on the media function at advertising agencies.

For many years, there has been a polarity of sorts, relative to how agencies and clients evaluate the efforts of agency media personnel. In its most limited form, these individuals are viewed as highly clerical, numbers oriented people who possess little imagination and perform a necessary but not overly pivotal function. At the other extreme are those with a fuller appreciation of the potential contributions that a media person can make to the agency and to the client's products or services.

In some quarters, there has even been confusion as to what sophisticated media planning and buying represents. It can be viewed primarily as expertise with sophisticated analytical systems and computer programs. While these are certainly important tools for the media planner and buyer, they do not represent the primary focus of all media thinking. Were this the case, then media departments would be air-conditioned computer rooms with messengers delivering input and forwarding output.

There are others who sometimes grudgingly acknowledge media expertise as it relates to the functions of

> **"As long as the client receives the audience weight paid for, outside influences remain just another alternative rather than a threat."**

lines must be redefined as this "personal" viewing becomes predominant. The availability of more channels, both through FCC allowances and cable and pay tv, has complicated measurements considerably (due to "splintering" of audiences). But history has proven that the best programing (measured by audience preference) prevails and will continue to be viewed.

Those clients unable to take advantage of "new" vehicles generally are confronted with a budget problem and can just provide enough dollars to maintain a minimal acceptable weight level.

As long as the client receives the audience weight he/she pays for, the outside influences remain just another alternative rather than a threat.

What should advertisers do?

Take advantage of charter advertiser pricing in syndicated programs and cable tv networks, providing the required target audience demographics and program environment are available. Examples are:

1. **ESPN — Entertainment Sports Network** — For male oriented products provides an inexpensive approach to reaching the sport "fanatic."
2. **"Your New Day" with — Vidal Sassoon** — For advertisers desiring a quality daytime television program aimed directly at female viewers.
3. **A do-it-yourself car care program syndicated nationally** — with the primary purpose of building car maintenance awareness.

In summary, we/you should continue to explore other avenues for delivering the advertising message. We should not lose sight of quality programing and bow to selection by cost per thousand only. Advertisers have spent too much money to maintain their "quality image" and difference in product results for them to succumb to the mass produced, miscellaneous shotgun approach. ■

MEDIA RESEARCH

by BERNARD GUGGENHEIM
sr. vp, group director
Media Information Services
Campbell-Ewald, Detroit.

The sky is falling — part 2

Some of you are aware that the prime network television share of viewing households has gradually been eroding and some have asked, "Is the sky really falling?" "Why is it falling?" — And, "If it is falling, will it continue to fall?"

The title of this article comes from a fairy tale called, "Henny-Penny". The story opens as follows: "One day Henny-Penny was picking up corn in the rickyard when — whack! — an acorn hit her upon the head. "Goodness gracious me!" said Henny-Penny; "The sky's a-going to fall; I must go and tell the King."

Well, this story isn't a fairy tale, and the sky isn't falling; but we certainly don't want to get hit on the head by a falling acorn. And that's the point of the story.

First of all, some facts.

A review of the four-year trend in prime time network share (Table 1) indicates for virtually every month a gradual erosion of the network share of household viewing audience. This erosion is most pronounced in the second half of the broadcast year (March-August) — and is particularly bad in the June-August period.

Over this same period, HUT levels have fluctuated slightly and, in fact, tend to be up a little bit in the 1979-80 broadcast year, so viewing levels in general haven't changed; but rather the disposition of the viewing has shifted.

An analysis of the Nielsen Multi-Market Network Area Reports (MNA) reveals some striking information. On Chart #1 three factors are displayed for the Mon.-Fri. 9:00-9:15 PM time period — The three network share, the remainder share, and a total, which exceeds 100. The network share figure is self-explanatory. The remainder share figure is actually composed of non-network viewing and network viewing of persons in the MNA area who view network stations outside of the primary MNA area. While this "remainder" includes some network viewing, its major component is non-network viewing.

The total of these two shares in effect approximates the ratio (index) of SIU to HUT. (SIU or sets-in-use is a term which has long fallen into disuse.) Shares are computed by dividing the household viewing audience of a program by the HUT levels. However, if a home has two sets and both sets are on at the same time but tuned to different stations then Nielsen counts each set as a viewing household in computing program ratings — but only counts that home once in the computation of the HUT. (By the way, that's the reason shares can total more than 100%).

The MNR Reports are the only reports produced by Nielsen which show the size of the non-network viewing levels and, therefore, approximate sets-in-use levels can be derived ("approximate" because it still understates the true SIU level).

The point of all this is that there hasn't been any change in the index of sets-in-use levels to HUT over the last three years. There is some slight falloff — 2 to 3 points — in the index of sets-in-use from October to July, which is understandable given the weather and the fact that individual members of the household are more apt to be out of the home. Thus with fewer individuals in the household there is a lower probability of multi-set usage.

The most significant finding of this analysis is that there has been a striking increase in "non-network" shares in October as well as in July over earlier years.

There are a number of hypothesis to explain these viewing pattern changes.

The first that comes to mind is the growth of cable, pay cable and on-air subscription television (stv). Basic cable imports independent television signals into markets and broadens program availability. Pay cable and stv divert audiences to non-commercial television. Right now these new media forms — at slightly over 20% household penetration — have not had a major impact on network shares.

Improved programing by the Public Broadcasting System and independents are a factor and non-network sports programing telecast may also be diverting audiences.

Local network affiliates appear to be more predisposed to pre-empting their network feeds in prime time.

There is no question that each of these factors, as well as others are contributing to the erosion that we see below.

It's not that people are turning away from television — it's anything but that. (In fact, basic cable homes view 15% more than non-cable homes, and pay cable homes 20% more.) It's simply that they are making difference choices. They are getting "picky" — and there is no question that as viewing options increase they will continue to get even "pickier." And it's a problem that we are going to have to live with as media researchers and buyers and planners.

It's a problem because we have to forecast the future when we buy television. If we are not aware of the underlying trends and the factors affecting these trends, we will be unable to make accurate projections of the viewing audience to an 8:00 p.m. show telecast on a Monday night in July.

A major problem in the prophesy business is telling a fluctuation from a trend. All we want to do now is turn on the early warning system and look out for falling acorns.

Henny-penny said she must go and tell the King but got so wound up in telling all the other animals in the farmyard that the "sky was falling" that "she never told the king the sky was falling!" In retrospect that was a smart move!

The fact is that between the 1976 and 1980 broadcast years the average network household rating dropped about *0.3 rating points*.

An acorn fell! The sky hasn't fallen — yet; but we better keep watching so that we can tell the king if it occurs.

Editor's note: Helen Johnston's column last month was concerned with the eroding share of network audience. She referred to the same fairy tale to illustrate the problem.

Trends in prime time three net share (Average % per month)

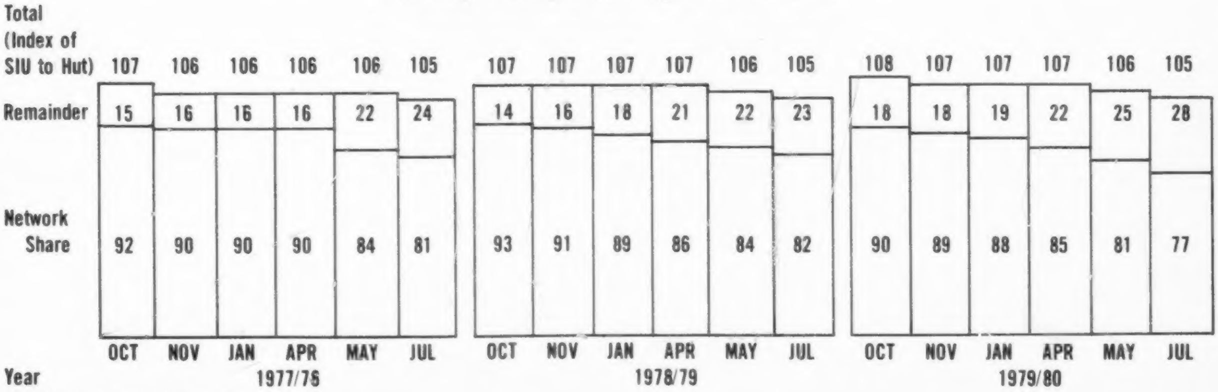
(Table I)

Mon. – Sat. 8:00 – 11:00 PM, Sun. 7:00 – 11:00 PM
September 1976 – August 1980

Broadcast Year	SEPT.	OCT.	NOV.	DEC.	JAN.	FEB.	MAR.	APR.	MAY	JUN.	JUL.	AUG.
1976 – 1977	88.5	94.5	93.8	92.0	92.8	93.8	92.5	90.8	87.3	86.4	87.5	87.0
1977 – 1978	90.3	96.3	94.0	91.8	93.0	93.8	91.3	90.4	87.3	85.8	85.5	83.6
1978 – 1979	92.0	94.8	91.5	89.0	92.0	93.3	89.8	88.4	86.8	84.2	85.0	83.6
1979 – 1980	91.0	92.5	92.3	90.2	90.0	91.3	87.3	87.0	84.0	80.2	81.0*	79.7*
1980 – 1981												
Change in Share From 76/77 to 79/80	+2.5	−2.0	−1.5	−1.8	−2.8	−2.5	−5.2	−3.8	−3.3	−6.2	−6.5	−7.3

(Chart #1)

Multi-network area share analysis
Monday-Friday Evening 9:00-9:15 PM



SOURCE: Nielsen MNA Reports.

Photo by Kitty Dawson

Brand Report 59:

Fast Food

After a decade of speedy growth, the fast food industry has suddenly hit hard times. The sour economy, higher prices for hamburger meat, and changing demographics have contributed to this stagnation. But if growth is slow, the media battle for market share is jumping. Tv is far and away the preferred medium; and now coupons and inserts are taking a prominent role.

Picture Ron and Wendy Smith.

Both working, they have three children in grade school, a home in a large American city — and like many people, are hard bitten by inflation and struggling to pay the bills.

A few years ago they would have taken a break a couple nights a week to eat out at one of the ubiquitous fast food outlets in their town — the food was cheap and the service fast and reliable. Now they are spending more time around their own dinner table.

The reason: in 1980, it has become more economical for a family of this size to eat at home than out.

The fast food industry has taken note of this fact as it enters the tough-est marketing year in its short history.

Though the economy isn't the only reason behind the fall-out, it is the biggest one. Once thought to be less recession sensitive than other industries, fast foods have come on hard times. According to several sources, fast food chains posted negative gains in real sales volume late last year after galloping along a 7%-10% growth per year over the last decade. These same sources claim that better times are ahead, but the halcyon days of umimpeded gains are gone.

Besides the negative state of the economy, there are some other clinchers that have proven inauspicious:

- **Beef:** Wholesale prices shot up two years ago and fast food outlets had to counter this with a higher ticket for their basic food item, the hamburger. Though inflation has since declined, the damage was done, some claim. Price-conscious Americans have not turned to their favorite food-stuff as enthusiastically as in past years. A Lehman Brothers Kuhn Loeb report on industry sales shows that between 1978 and '79 fast food burger sales increased 16.5%, but it goes on to say that a "goodly" part of this figure is attributable to price increases.

- **Gasoline:** The petroleum business and the fast food business have a symbiotic relationship — when people can't get gas they don't drive as often to their favorite restaurant. Fastfooders discovered this during the 1974 oil embargo; the same thing occurred in 1978. Says Bill Trainer, vp at Merrill Lynch: "After the '74 gas shortage people got back into their old driving habits. It did not happen this time. Travel by car is lower this year even with the availability of gas."

- **Working Women:** When the female work force blossomed, so did fast food sales. Squeezed for time, working women turned more frequently to fast food for sustenance. But this work force segment is growing less rapidly than in the recent past. "The trend seems to have run its course," comments Roy Bury, an analyst with Kidder Peabody.

Another demographic trend that fast food marketers are beginning to adjust their sights to is the aging of the American population. Simply put, "As kids we would eat five hamburgers a week," says Bury, "As adults, we don't."

Though still heavily reliant on kids (McDonald's and Burger King are powerhouses in Saturday morning tv), fast food chains are now using their marketing and media muscles to embrace a broader spectrum of the population. Wendy's, for example, discovered its key to success through adult males — the "hot and juicy" hamburger is large, for large appetites.

- **Saturation:** To anyone who has travelled the highways of America, it is no secret that the fast food phenomenon is in full force. Some might say that it has matured. With thousands of restaurants and dozens of chains, the big operators are finding that their share dominance is being assaulted from all sides. Many chains cater to different tastes and different sized budgets — and with this sort of specialization the biggies are finding it tougher and tougher to maintain sales. Needless to say, the media expenditures in the marketing battle ahead call for massive outlays — mostly in tv.

New product craze

For those not suffering from a big Mac attack, there's always the McChicken sandwich. Or maybe a chopped steak sandwich. Perhaps the most significant development in fast foods over the last year has been new product proliferation. All of the major chains have expanded their menus in the hopes of attracting customers not necessarily fond of hamburgers. And this expansion has proven enormously successful. Burger King reports that 25%-30% of all sales come from sandwiches, which means that three out of ten sandwiches sold are not hamburgers. McDonalds is notching 20% of its sales in the non-hamburger category.

There are numerous factors contributing to this change in direction, but the big one is to stave off the slump in the hamburger arena, according to sources. With a wider variety of food offered, there are more reasons to make a trip to the local Restaurant.

One potential hazard to the new

It's nice to feel so good about a meal.

Young & Rubicam's strategy for client **Kentucky Fried Chicken** is to emphasize the value and quality of chicken. After several years of hard times, the chain is beginning to turn around, as the public is clamoring for chicken. **Paul Knopf** heads up national co-op ads.

product phenomenon is that it could create an impediment to speed: Notes Carl DeBiase of Sanford C. Berstein, "If fast food becomes slow food, these guys have problems."

Chicken is the new darling of the industry. Each of the three major chains have their own version of a chicken sandwich and they report that it is selling briskly. Though advertising is still geared to plugging the burger, major promotional events are trumpeting the advent of chicken.

Breakfast fare has also proven a boon to business. After McDonald's successfully weaned the breakfast market with its Egg McMuffin, Burger King followed with its own version. Hardee's, the first to develop the breakfast daypart, recently introduced the "homemade biscuit breakfast" which is a full-sized meal served with a fresh batch of biscuits. Hardee's has a good reason to devote so much attention to its breakfast line-up: it contributes 30% of the chain's total sales.

Tv Guns

Fast food marketers target as potential customers just about anybody with a mouth. That's a hint of the main thrust of most company's media strategies.

Television is the battleground in the heated struggle for market share. Fast fooders have always liked the medium because it enhances the food product. But the mass coverage is perhaps more important. The total net tv outlay for the industry hovered close to $140 million in 1979. Spot tv reached a staggering $282 million. The top four chains, McDonald's, Burger King, Kentucky Fried Chicken, and Wendy's, commanded 79% of the net tv outlay.

Spot tv figures for all chains are usually based on a percentage of a given market's sales. Co-ops among franchisers and owned and operated stores are formed in ADIs/DMAs and the exact figure is agreed upon — thus budgets vary across the board.

The head office will usually encourage its co-opers to meet a minimum base — and they'll strongly encourage the use of tv. Usually this minimum base is fixed at 3% of sales though some chains are known to go above and below this. McDonald's, for instance, suggests its stores allocate 5% of sales to advertising. This is apparently the highest in the business.

Curiously, magazines have faired poorly in fast food media plans: McDonald's has the only appreciable expenditure, at $1.5 million.

This doesn't mean that print is bypassed: one of the big stories in fast food media strategy this year is the coupon and insert craze. One chain, Arby's, reported a 50% increase in its national insert usage. Others are also accelerating usage, though at a somewhat less heady pace than Arby's. Almost all are finding inserts valuable in trumpeting cents-off bargains and for promotional events.

Ray Frye, account executive at **Long John Silver**'s in-house agency Abbott: "Value is becoming important to the consumer. In the fast food business it's who can deliver the best product for the best price possible."

This year should see the initiation of some unusual and aggressive marketing/media strategies in the fast food business: Following is a look at what some of the major chains are doing.

McDonald's

McDonald's is the Procter & Gamble of the fast foods business — or perhaps it would be more accurate to say P&G is the McDonald's of the package goods business. Whichever, both are far and away the leaders in their respective fields. Both far outspend their nearest competitor and both enjoy whopping market share advantages.

McD's sales hit $3 billion for the first six months of 1980, giving it a comfortable lead over Burger King's $1.4 billion in total sales for 1979.

But when winds buffet the industry as they are doing now, McDonald's is the first to catch a chill. The company has swiftly initiated some antidotes however: the McChicken sandwich was unveiled quickly in response to consumer demand; a chopped steak sandwich came out shortly after; steak was added to the night time menu but was withdrawn when customer crushes slowed down operations; and to tout all of this, the company has surged forward with media expenditures that have increased roughly 20% annually over the last four years. An industry publication, *Financial Institutes*, estimates that McD's will spend $200 million on its 1980 media effort.

Spot television is the big spike in McD's strategy. OPNAD, the company's local media planning unit, draws up this strategy for 6,000 stores. Supporting this are 75 local agencies which give their own input for the co-ops. Spot tv expenditures in 1979 ran over $75 million.

McD's spending patterns in network tv show the hottest area of interest for the company, however. Net expenditures have grown 60% in three years; spot tv has grown 28%.

Magazines have also begun to hit their stride with this giant fast fooder: spending $470,000 in 1978, the company changed directions and added $1 million to that figure in 1979 — a 225% increase. This is partly attributable to stepped up promotional activity. Some of the books used are *Better Homes & Gardens, Life, Newsweek, People, Sports Illustrated, Time,* and *Woman's Day*.

Wendy's

Perhaps part of McD's network splurge has been in response to Wendy's aggressiveness, a company which in recent years has strongly asserted itself in the network marketplace. Coming from virtually a zero base in media expenditures in 1973, this chain suddenly found $20 million in 1979 to help expand its $1 billion in sales

Media spending for leading Fast Food Brands — 1979

Chain	total	magazines	supplement	net tv	spot tv	outdoor	spot radio
Collins Food							
Sizzler Steak	$ 7,990,200	—	—	—	$ 7,864,000	$ 67,000	$ 38,595
Denny's	4,866,400	—	—	—	4,027,200	48,500	790,650
General Foods							
Burger Chef	5,906,800	—	—	—	5,438,000	190,600	278,170
General Mills							
Red Lobster	13,953,600	—	—	177,800	12,880,100	52,700	842,990
Hardee's	8,915,500	—	$63,300	—	6,846,400	256,700	1,749,100
Heublein							
Kentucky Fried Chicken	32,264,900	—	—	17,233,700	14,322,100	390,500	686,104
Dairy Queen	6,017,400	—	—	—	5,365,100	93,500	558,758
Jerico							
Long John Silvers	12,505,400	—	—	1,876,000	10,449,900	15,100	114,380
Marriot							
Bob's Big Boy	5,772,100	—	—	—	5,745,800	26,300	—
Roy Roger's	3,654,200	—	—	—	3,219,600	60,600	373,980
McDonald's	142,339,200	1,519,000	—	62,456,300	75,334,200	2,383,100	646,616
Mrs. Paul's Kitchens							
Arthur Treacher's	8,519,700	14,900	—	—	7,589,300	17,400	898,090
Pepsico							
Pizza Hut	14,411,000	9,500	—	10,363,800	3,510,000	59,100	468,620
Taco Bell	8,112,600	—	—	—	7,357,200	2,600	752,760
Pillsbury							
Burger King	45,109,400	52,600	—	21,403,200	22,201,700	527,600	898,790
Ponderosa	8,062,300	—	—	3,677,300	4,338,700	21,100	25,107
Ralston Purina							
Jack-In-The-Box	10,031,200	12,700	—	—	7,606,200	14,600	2,397,690
Royal Crown							
Arby's	13,099,200	—	—	3,423,500	9,496,300	157,500	21,850
Sambo's	8,746,000	119,500	—	7,620,500	866,600	22,100	58,695
Wendy's	20,249,200	—	—	8,866,200	10,839,300	448,900	99,809
Total industry:	**$448,769,700**	**$6,514,400**	**$97,700**	**$138,711,700**	**$282,733,200**	**$8,883,000**	**$11,700,760**

Sources: LNA/BAR, RAB/RER. Included in totals but not in detail are small expenditures recorded for newspapers and network radio. Figures not available on larger use of newspapers locally.

(fourth in the industry after KFC, McD's and Burger King.)

Wendy's, as mentioned, found its niche by developing the adult market, But a sales slowdown, which outpaces what the overall industry has been experiencing, has told the company it is time to climb new mountains. A salad bar was added to restaurants for divergent tastes of women (who apparently have greater salad addictions than men); a chicken breast sandwich has made its debut; and a so-called "fun pack" for children is now on the menu which features a kid size hamburger.

A Wendy's source notes that a new agency search is underway — and that the company is currently reevaluating its entire marketing program.

Burger King

When president Don Smith — who has been dubbed the "Fred Silverman" of the fast food business — left the halls of BK for Pepsi Cola's Pizza Hut a couple of years ago, many wondered whether the company would be able to regain its stride. Apparently it has, as it slipped past Kentucky Fried Chicken last year to become the number two company in the industry.

But it is not resting on its laurels: like McDonald's, BK has initiated a number of new strategies to lure customers. Games, new products, and gifts are in stores now because, in the words of Kyle Craig, group director of

BEST AVAILABLE COPY

Hardee's hopes the above ad running on spot tv will spice up its appeal to a younger crowd (18-40). The burger chain is concentrating on those areas where it's had traditional success. This means it will capitalize on youth, the southeast region, and its breakfast menu. Says **Casey Jones,** vp-account supervisor at agency Benton & Bowles: "You can't be all things to all people."

national advertising and sales promotion for the chain, "people need an extra reason to visit the stores — they are looking for variety in their eating experience."

Among the gimmicks used was a "Star Wars" glass promotion run during August and July. If the patron bought a Coke, he could buy a glass for an extra 35¢. 16½ million glasses were sold.

Net tv is still the mainstay for the mass message, taking over 90% of all national dollars, according to Craig. BK buys exclusively in prime time and Saturday morning: this carries the product and "thematic" message (eg. the "Star Wars" promotion.) Prime time is used for the 18-34 market — top-rated shows are tagged.

Radio time is bought on the two black radio networks for BK's ethnic skew; local markets also pick up radio time for promotion and to extend reach. MOR stations are also bought for the teen and young adult market.

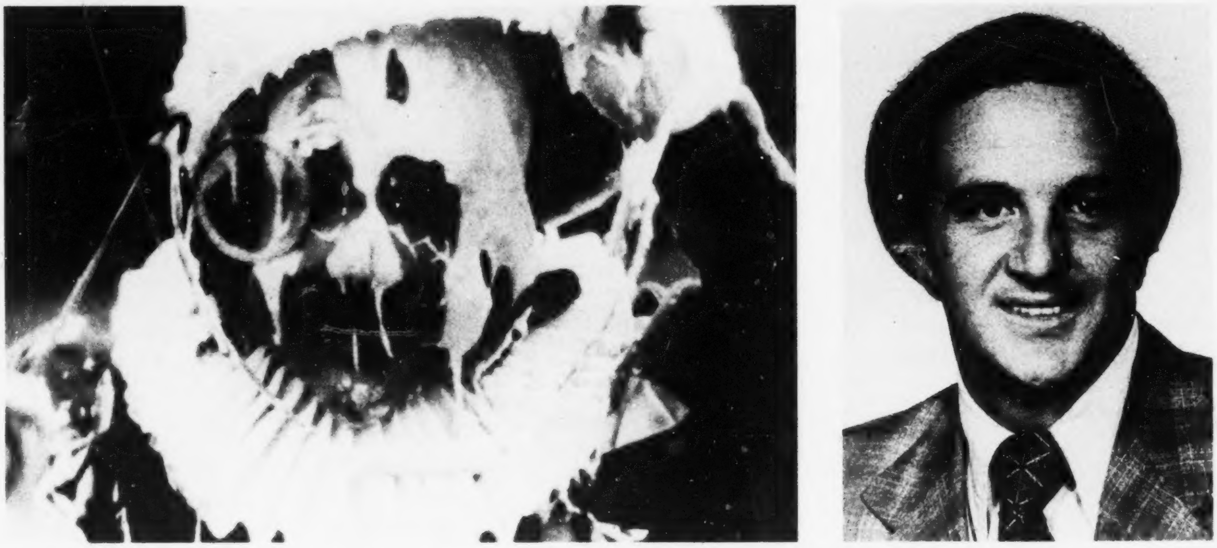
BK hasn't followed the rest of the pack in using coupons: the reason, according to Craig, is that rather than discounting the product the company prefers to attract prospects with games and promotions.

Arby's

When Royal Crown picked up this small chain in 1977 it wasn't under the best of circumstances — giant McDonald's was barn storming the rest of the industry. But under careful tutelage Arby's has managed to carve a 4% market share (by comparison, McD's has a 19% share and nearest contender Burger King has a 5.9% share of market.)

The chain got a boost a couple of years ago when it lured two top executives from BK during a time of extensive management shake-ups at several Pillsbury divisions. The two are Chris Shoenleb, exec vp, and Larry Krueger, vp-marketing, who spent a year at Kentucky Fried Chicken before making the move to Atlanta and Arby's.

Under Krueger's direction, Arby's will be going head to head with the majors in 1980. The new strategy calls for added emphasis on network tv — the home turf of McD's. The new move will be to concentrate dollars. In the past, scatter buying ruled the strategy.



Burger King is using a slew of gimmicks, promotions, games, and new products to bring customers into its stores. Comments **Kyle Craig,** group director of national advertising and promotion for the chain: "People need an extra reason to visit the stores — they are looking for variety in their eating experience."

Says Krueger, "Our feeling is that with limited dollars, scatter buying is not the most effective way to get the most for your money." The new network schedule began in October; its basic function will be to support the overall campaign — and to provide backup for those restaurants in certain markets that can't afford tv.

Sports and prime time were tagged for the new effort. Both are used for different reasons. Sports gives the male audience — "an important part of the business," notes Krueger — as well as the usually unmeasured college crowd inhabiting fraternities, bars, and lounges. The prime time buy achieves two goals: picking up the all family audience and re-inforcing the female skew.

Arby's can't afford a separate kids' effort in their media plan, so the company settles for late night tv, which is a good second best. For the individual franchisee buying spot, the head office encourages early and late fringe, to reach the female target.

Radio, a mini-buy for Arby's, is used variously for promotional value, tv supplement, and for those markets that cannot meet the tv bill.

When at Burger King, Krueger mulled over whether to write magazines into a plan, but he questioned their effectiveness for food items that thrived on sight and sound. Inserts are different: Arby's runs roughly 50 million inserts a year in such publications as *Parade* and *Family Weekly*. The free standing insert "is used to deliver a message and to deliver customers." The "message" is normally a coupon or two-for-one offer — a marketing device the fast fooders are using aggressively.

Dairy Queen

Figuratively speaking, DQ wears two hats: it sells a lot of "soft" ice cream and it sells hamburgers. As far as its ice cream sales are concerned, DQ is the undisputed king (or queen, if you will.) But now hamburgers and hot dogs scratch up 40% of total sales.

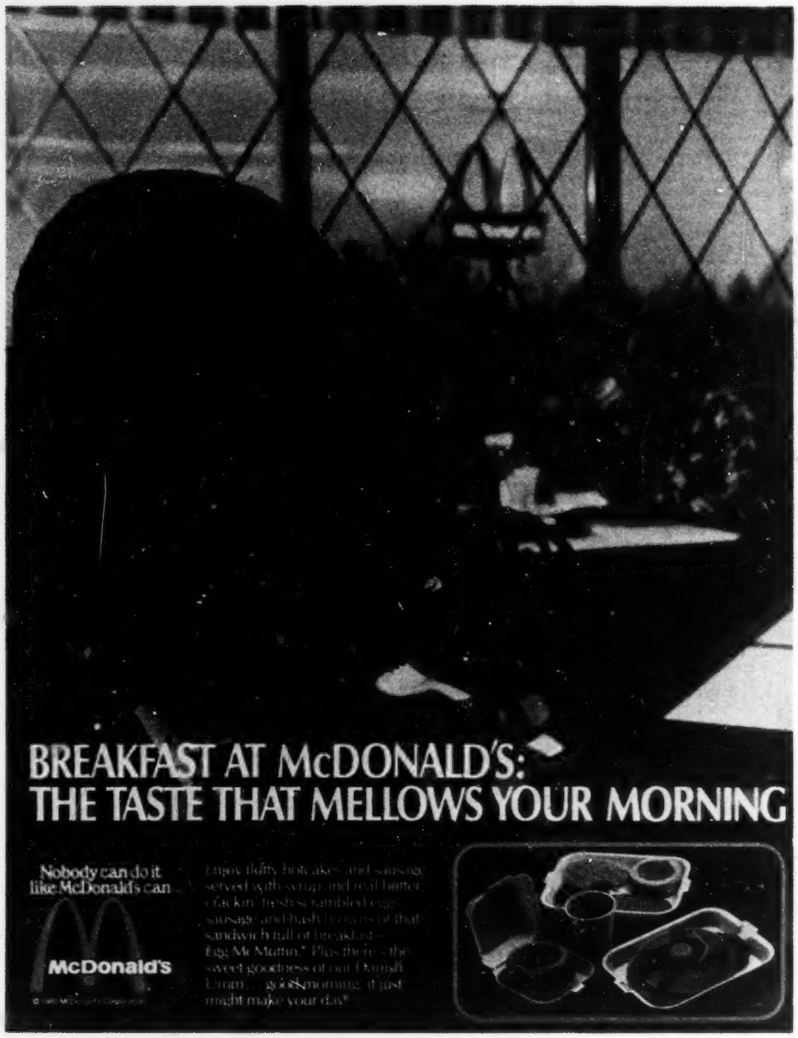
As such, DQ has reigned in one of the traditional media staples in fast food advertising, tv. 80% of its $6 million budget goes into spot tv. The company likes tv for the mass market but uses it extensively to cast for an especially important market segment, young kids. Prime time, prime access, and early fringe are tagged to reach 18-34's with children and to reach the six to twelve-year-olds. (65% goes into early fringe.) DQ figures this is the way to get around the lock the majors have on Saturday morning tv. Net tv is bypassed for a simple reason: the areas where DQ is weakest–Los Angeles, Chicago, and New York — are where the nets have their greatest delivery.

On the local level, DQ has managed to convince the franchised and owned operations to increase their tv budget 35% over the last year, according to Gary See, vp-marketing for the chain. This increase well exceeds the industry's average tv build-up for 1980, which, as estimated by *Finance Institutions,* is expected to grow 29%.

Next in importance for DQ comes its supplement buy. $400,000 buys a full list of *Family Weekly* and *Parade*. This is used to back up the company's couponing efforts. Direct mail is used by one out of four stores: while running a national sweepstakes program DQ sent prospect homes scratch-off game cards.

Burger Chef

Like Goodrich tire, Burger Chef has the stigma of sharing a similar name with a larger competitor. But unlike Goodrich, this hasn't presented a problem for this burger chain. Explains Don Lum, director of marketing: "Burger King is not strong in the market where we are — and this is helpful." But in those markets where BC does have the wind to its back — Michigan, Indiana, Eastern Missouri,



BREAKFAST AT McDONALD'S:
THE TASTE THAT MELLOWS YOUR MORNING

Nobody can do it like McDonald's can.

Enjoy fluffy hotcakes and sausage served with syrup and real butter, crackin' fresh scrambled eggs, sausage and hash browns or that sandwich full of breakfast— Egg McMuffin.® Plus there's the sweet goodness of our Danish. Umm... good morning, it just might make your day.®

McDonald's

McDonald's uses magazines, in part, for its black effort. This one appeared in *Ebony* and *Essence*. It's one of the few fast food chains that write magazines into its media plan: this ad illustrates that some of the sight and sound tv gives can also be transferred by print.

West Pennsylvania, Ohio, and West Virginia — McDonald's is the dominant power. So instead of trying to bowl over the king pin, BC has concentrated on a specific market: the adult male. To reach him, BC buys heavy spot during early and late fringe and prime time. Pre-teens kids are now of secondary importance for the chain.

To realign itself, BC concentrated on its lunch and dinner menus. Creative has centered on its man-sized Top Chef, a large hamburger, and Chicken Club. Its menu will continue to be diversified to make dinner and breakfast a more attractive alternative for the working male. BC also wants less reliance on beef because of inflated prices. Lum draws the line on this expanded variety: "We're still a long way from peanut butter and jelly."

Kentucky Fried Chicken

After a decade of serious internal management problems, this mass marketer of fried chicken goodies has put itself firmly back on its feet, according to industry observers. Back in the early seventies KFC violated some sacred fast food tenets: food quality changed store to store, service varied all over the lot, and store decor ranged from acceptable to tasteless.

All of this has changed as the company has steered into a "back-to-basics" programm. KFC chairman Michael Miles formally instituted a buzz work that signifies this change in direction. The jaw breaker reads "qscvfoofamp" and means quality, service, cleanliness, value, facilities, other operating functions, advertising, merchandising, and promotion — in other words, KFC is placing emphasis on all things that had been more or less ignored. Value is an essential word in the lineup as it pintpoints KFC's position against the Burger Kings and McDonalds. The company's current theme is "good food, good value."

Three years ago the chicken chain began to turn things around. The first step was a new agency for the national account: Young & Rubicam. Y&R embarked on the value campaign and emphasized the quality of chicken over burger items. Step two was to hold up media dollars. This expansion was partly to keep pace with inflation but more to maintain share of voice. A third and essential step was to bind the chains' 4,291 stores together so that a common goal could be worked out. One of the early sticking points was that each store very often went its own way. 60 to 70 co-ops were formed.

From Louisville headquarters, Paul Knopf, president of KFC National Co-op Advertising Program, Inc., has control over this grand design. Knopf provides the national media clout the individual co-ops can't afford and he makes recommendations to the company's individual components on how best to use their media dollars.

National media is a $17.5 million net tv buy. KFC believes this gives added strength to the $14.3 million in spot tv buys made around the country. Three dayparts are used: primetime, to net "everybody" in the 25-49 category; daytime, for women 18-34 with children; and sports, to balance the delivery. Perhaps the only fast fooder who makes an appreciable buy in daytime tv, Knopf explains "we're very interested in reaching women with children because we believe they are the key decision makers in food purchasing."

Knopf says that he is also suggesting to the co-ops that newspapers get tagged for their local efforts, though inserts are bypassed: "We're using newspapers as vehicles for delivering coupons. We don't do inserts because our testing shows that in ROP vs. insert, ROP comes out more efficient."

Long John Silver's

As with KFC value is the catchword for this growing sea food chain. And because its mainstay markets are mostly land locked states, the fact that it sells fish instead of beef has proven a boon. Says Ray Frye, account exec at Long John's in-house agency Abbott: "Value is becoming important to the consumer. In the fast food business it's who can deliver the best product for the best price." The prospective consumer thus sees ad copy that displays dishes of fish fillets, shrimps, clams, scallops, or chicken planks — and price.

Long John's buys spot tv in 38 states, covering 1,050 stores. The bulk of its $12 million budget finds its way to Texas, Oklahoma, Kansas, Ohio, and Kentucky. The company has retrenched in the northeast after sales didn't materialize because, according to Frye, "it is a sophisticated fresh fish market."

Hardee's

This 1,300-store-strong chain has taken stock of its place in the world of hamburgers. Like the majors, it has diversified its menu (and will soon be testing chicken), has built up its breakfast day part, and new stores are springing up.

Hardee's has narrowed its marketing effort to the 25-40 age category, and is concentrating its growing media effort in the south east, where it is strongest.

Simply put, the new market situation is "the survival of the fittest," notes Dick Diemer, director of marketing management. This survival means concentrating on areas where strengths already exist. Hardee's new pragmatism is reflected in a comment by Casey Jones, the account supervisor at Hardees' New York agency, Benton & Bowles: "You can't be all things to all people."

Media-wise, spot tv is bought heaviest in markets where sales are strongest. The 1980 buy will top $13 million. Radio is used to support tv and carries both generic and promotional messages.

On couponing and inserts, Diemer expressed some ambivalence: "Couponing is a valid tool if it's used for a specific marketing purpose. The problem we experienced is that by using it too regularly people started to hold back for the coupon and were not buying at full price." Though research didn't show that this was actually happening, the gut feeling was that couponing was hampering the chain from achieving sales goals. "After expiration of the coupons," says Diemer, "our sales would go back to normal."

Inserts run regularly in national supps every Sunday.

— Verne Gay

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THEY DON'T BUY BOSTON NEWSPAPERS.

Worcester may be part of the Boston ADI, but to reach it you need Worcester newspapers. Just ask companies like these.

Big retailers know that New England's second largest city's an important market in itself. And they know how to get it. With the Worcester Telegram and The Evening Gazette. Because in a market where 84% of the people use a daily newspaper for shopping information, we have fourteen times as many readers as The Boston Globe.***

** "Worcester Facts" Yankelovitch, Skelly & White 1979.*
***ABC Audit Report, 1980*

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Represented nationally by C.W.O. & O.

Morning, Evening, and Sunday.

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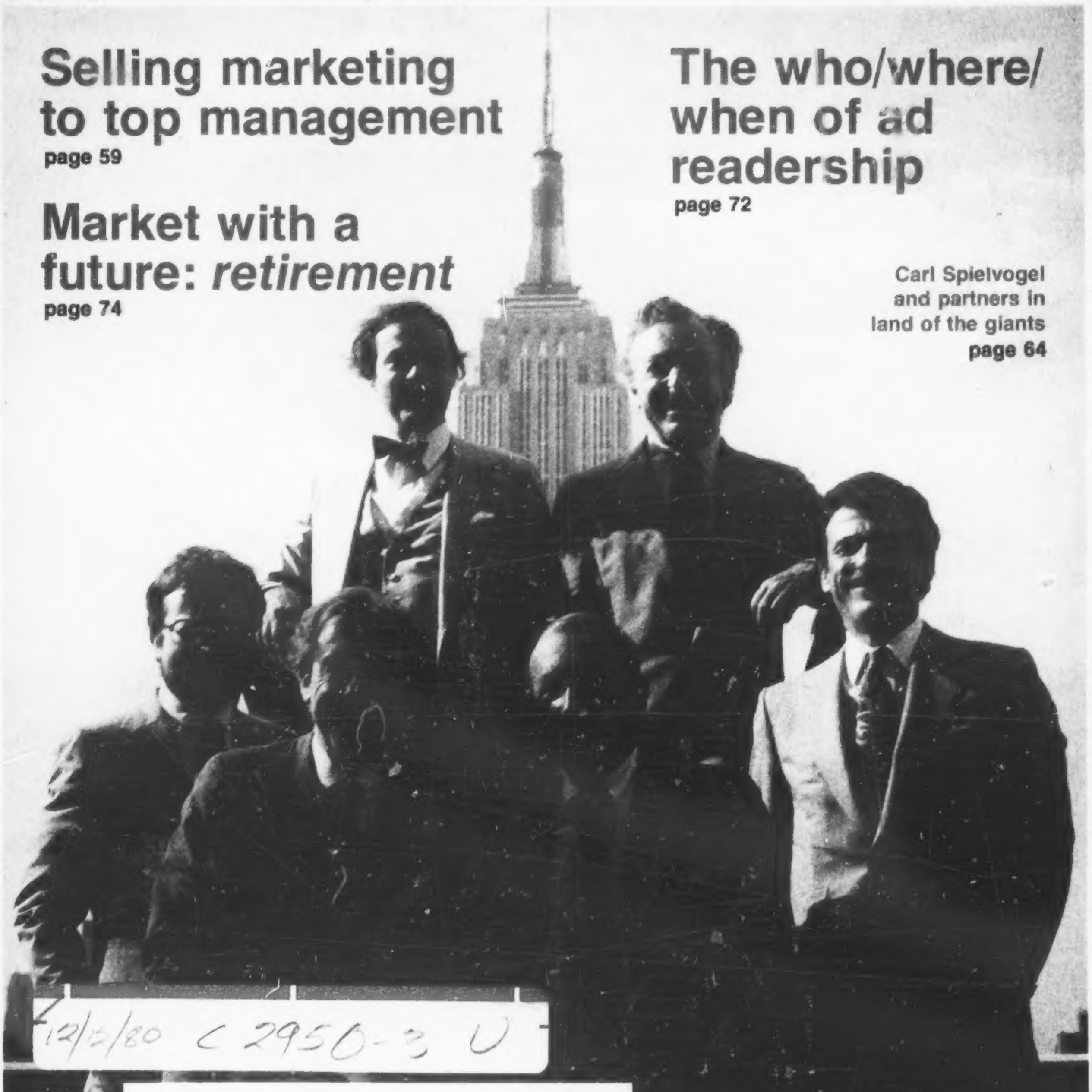

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and partners in
land of the giants
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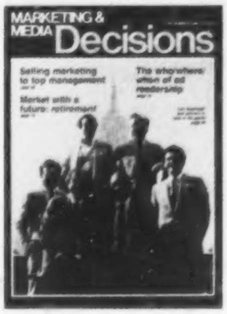

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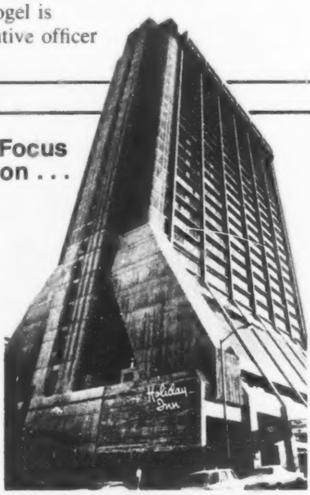

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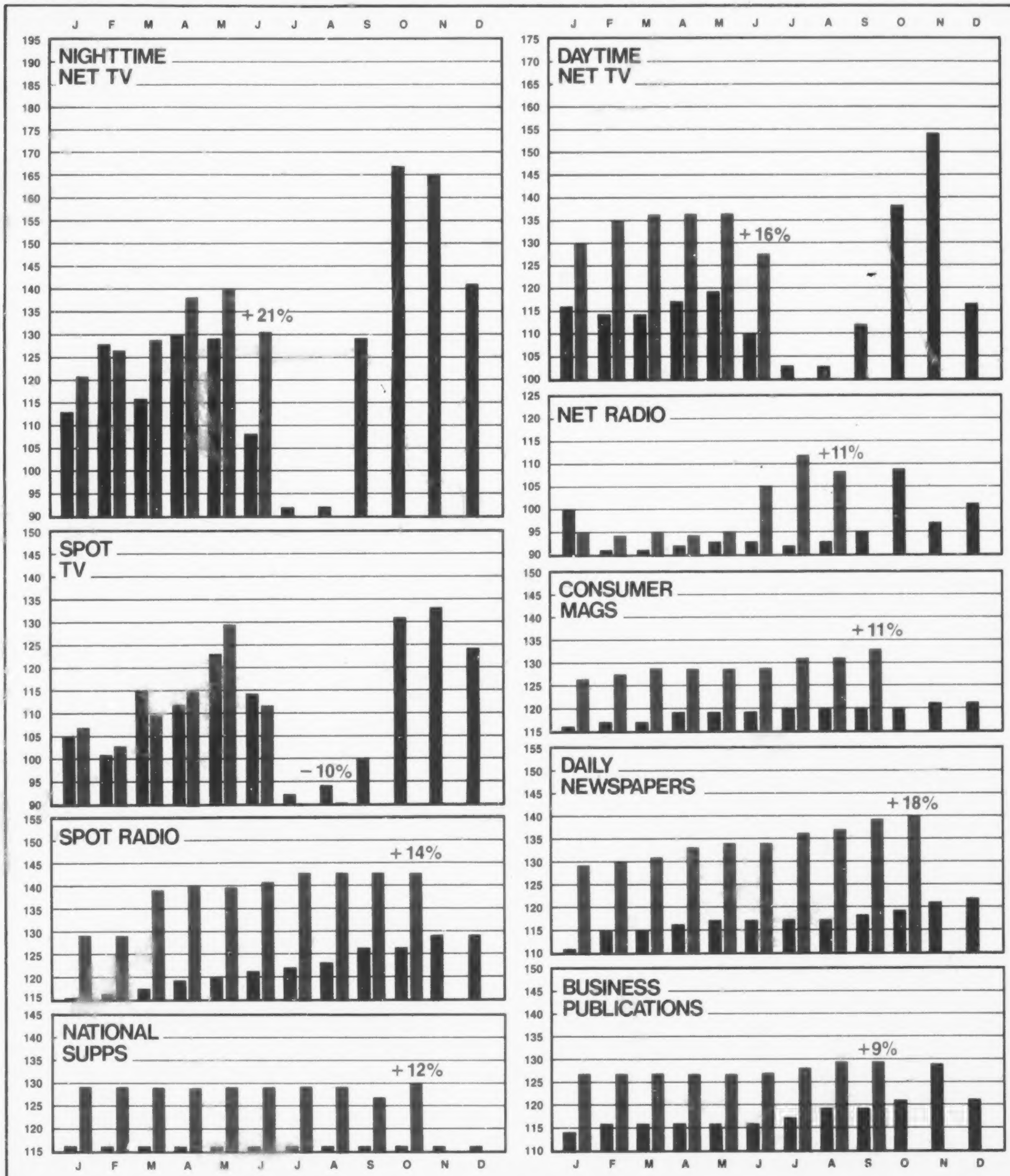
MEDIA COST INDEX

Black bars index for 1979; red bars 1980; base year 1977
Prepared by J. Walter Thompson Media Department



METHODOLOGY: The Media Cost index reflects industry reported trends extracted from available published sources. JWT Media Analysis utilized standard competitive report sources to develop comparable unit costs that reflected monthly cost trends by medium. Where industry competitive sources are unavailable, JWT sampled selected cost data from SRDS. Definition of the sources, universe, and media units used follows: *SOURCES*– **Nighttime Network TV**/BAR estimated commercial minute cost for *all* Night-time Network TV (6 PM to sign-off). **Daytime Network TV**/BAR estimated commercial minute costs for *all* Daytime Network TV (Sign-on to 6 PM). **Spot TV**/BAR CUME National Spot TV Report for estimated commercial minute costs for *all* national and regional Spot TV activity in 75 markets. **Network Radio**/BAR Network Radio Report used to estimate *all* three network (Excluding MBS) commercial minute cost. **Attention: Due to a change in BAR's source for commercial minute cost we are now using Jan. 1979 as a base for new index.** **Spot Radio**/JWT estimates based on reported SRDS cost of one minute on one station per market in the top 50 RADI markets. **Consumer Magazines**/JWT estimates based on reported SRDS cost of a P4/C for 30 national consumer magazines based on circulation. **National Supplements**

YELLOW PAGES:

A dim medium grows brighter

Lack of standardization has made the Yellow Pages hard to buy nationally. Problems persist, according to major users, but nearly all agree that the outlook is improving for this very necessary medium.

Advertising in the national yellow pages is like being married. You can't live with it and you can't live without it."

That attitude, expressed by Sid Sax, director of advertising and corporate communications at Ryder Truck Rental, sums up the opinion held by many large national advertisers using yellow pages — a rapidly growing — and improving — medium, but one that is still lacking in some respects.

The good news is that the yellow pages serve a function no other medium can match. It has the advantage of being an all-year medium that can direct consumers attracted to a brand by mass advertising to a local outlet where that brand is sold. It reaches consumers in the frame of mind to buy. In that sense, yellow pages is not so much a medium as it is a marketing tool.

The bad news, which annoys many large advertisers, is that the medium is a nuisance to buy.

Advertisers said the more than 6,000 yellow page directories lack standardization. Uniform ad sizes are just not there. A single ad often has to be remade dozens of times to fit size requirements of individual directories. Closing dates are a problem too, they said. The books' closings are scattered throughout the year, and as much as 18 months sometimes elapses before a scheduled ad appears in a directory. Regulations on what headings an advertiser can be classified under also vary from book to book. Variations even exist between books published by the same company, advertisers say.

Fred Smykla, executive director of the National Yellow Pages Service Assn. downplays those complaints. "I've never heard any advertiser complain about lack of standards, at least not to the extent that it is a problem. Each directory publisher makes his own regulations based on what the community needs. That's just the way it is done," he says.

Aside from the coordination problem, advertisers are worked up about graphic restrictions.

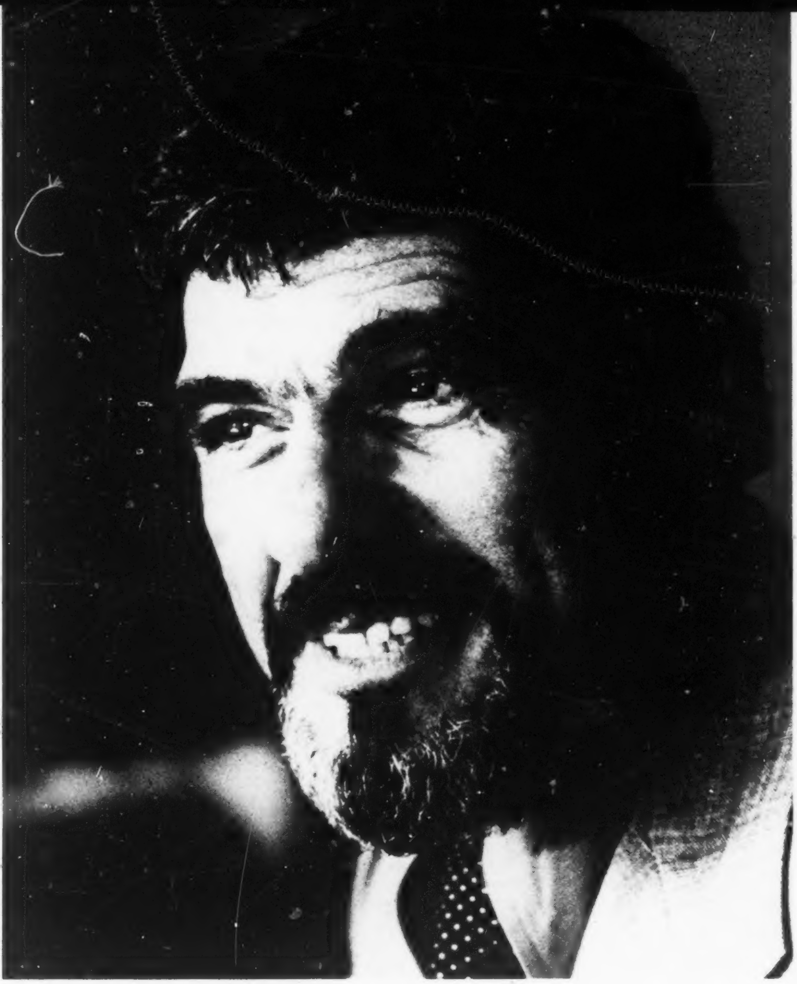
"The yellow page publishers tell you where to put your ads and what to say in them. They limit you in the size of type, amount of black space for reverses, size of border lines and even the kinds of words to use. Plus you can't do price advertising in them," said Sid Sax, who monitors the fourth largest ad budget in yellow pages at Ryder Truck Rental.

Echoing that complaint is Meg Jacobson, vp-advertising for Budget Rent a Car, the third largest yellow page advertiser. "They screen you for any heavy use of black type. They even wanted to screen our logo," she said.

Errors made in yellow page ads either by the printer or publisher also irk advertisers and their agencies.

"We're having a war on errors," said Jim Kline, president of American Tele Pages, a specialty ad agency for

"The yellow page publishers tell you where to put your ads and what to say in them," says Sid Sax of Ryder Truck Rental.



yellow pages. "There are just so many ridiculous errors. I've seen funeral directors listed under lawn equipment headings. The errors popping up are unreal and the agencies are really upset about it."

Difficulty in measuring a yellow page ad's effectiveness also is on advertisers' list of problems. Complicating the problem is the emergence of several independent neighborhood directories that take readership away from larger area directories, advertisers said.

For every complaint, there seems to be an answer. Uniformity in yellow page ads is lacking because of keen competition for business. The publishers don't talk to one another just as Macy's doesn't speak to Gimbels, one source said.

Graphics are restricted not to irritate the advertisers but to protect the reader from a hodge-podge of listings, directory publisher representatives said. They also claimed that errors are few and far between compared to the huge number of listings.

As for research problems, they said, the coming addition of coupon inserts in many books will help advertisers measure results.

Not all complaints are directed toward publishers. A controversial area is the emergence of agency seller representatives (ASRs) in the business. While the ASRs may be helping to increase advertiser use of yellow pages, and are recognized for that by the National Yellow Pages Service Assn., advertising agencies contend that the ASRs work for the publisher and leave the client out on a limb when complaints arise. ASRs also retain the entire commission, while a general agency splits the commission with a clearing house that represents the publisher.

National yellow page advertising also has suffered from a stepchild syndrome. Because advertising in the yellow pages requires a lot of detail work, ad agencies and their clients have focused attention on more glamorous work. But most said this situation is changing, if slowly.

An exception to that general rule is Kevin Keary, the enthusiastic head of a separate yellow page department at Doyle Dane Bernbach. His department has grown from two accounts in 1974 to more than a dozen now, including such big clients as Volkswagen and American Airlines. In 1981, Keary becomes president of the National Yellow Pages Advertising Assn., a group of agencies specializing in that medium.

Keary said he is concerned that agencies are setting up yellow pages divisions only to reap the profits. "Yellow page departments cannot be introduced and then casually put aside for implementation. That hurts the client. It takes dedication," he said. "That's why speciality agencies for yellow pages came into being."

Continued on page 114

YELLOW PAGES (from 69)

Despite the concerns and gripes, national yellow page advertising is growing. It reached a record high in 1979 revenues of $28 million, up 17% over last year's $241.5 million, the largest one-year increase in its history, according to Fred Smykla, executive director of the National Yellow Pages Service Assn. He has projected that 1980 revenues will reach $350 million, a 24% jump.

One reason for that increase is a growing advertiser awareness that the yellow pages is the place to be because of the high cost of gasoline and the general ill health of the economy.

Improvements made in the medium itself might also encourage new advertiser interest. National advertisers can now advertise in as many directories as they want with only one contact, and one contract. Before, they were contacted individually by dozens of selling representatives. National yellow page advertising was fully computerized almost three years ago.

The emergence of demographics as a means of selling yellow page advertising is also helping to move the medium forward. For instance, health care industries interested in reaching an older population can segment their yellow page advertising.

Another means of segmenting is by advertising in the business-to-business yellow pages that are cropping up. General Telephone Electronics Corp. took out a full-page ad for its industrial lighting division in the Atlanta directory when that city split its yellow page directories into a consumer and commercial book, according to Peter Eder, director of corporate marketing communications.

Other more minor improvements include the growing use of coupon inserts, and maps with keyed coordinates within the ads. Four-color inserts are also in the works. A red color is already being used in typefaces for several advertisers. Many doubt, however, whether the additional color is an improvement. Yellow and black is the most outstanding color combination.

"If I were an advertiser, the first thing I would want is for everyone else to use red on yellow. Then my ad would stand out," Keary said.

Even without improvements, yellow page advertising would probably prosper. Budget Rent a Car's vp-advertising Meg Jacobson said Budget uses yellow pages because over 50% interested in car rentals use the yellow pages. Budget attributes 40-45% of its local sales revenue — excluding airport rentals — to orders generated through the 600 different directories it uses. Jacobson pointed out their yellow page program is so important to their business that the company "times the selling of franchises around the yellow page closing dates."

Budget is one of the few yellow page advertisers handling its program in-house, with five staffers implementing its $1.7 million budget.

Ryder Truck Rental also attributes a good deal of its business to the $1.5 million it spends in yellow page advertising. Sid Sax notes that 80% of their occasional, short-term rentals come from its yellow page ads, which represent one-third of the large truck rental firm's ad budget.

"About one-half of our fleet is leased to businesses on a long-term basis," Sax said. "It's the remaining business with consumers for local and one-way household moving that is impacted by the yellow page program."

Joe Comiskey, manager of advertising administration at American Airlines, also sings praises, noting how crucial the yellow pages are to his business. "It's essential for us," he said. "We couldn't do without it." ■

1979 national revenues for largest yellow page publishers

Southwestern Bell Telephone Co.	$44 million
General Telephone Directory Co.	$26 million
The Pacific Tel. & Tel. Co.	$22 million
Southern Bel Tel. & Tel. Co.	$21 million
New York Telephone Co.	$17 million
The Bell Telephone Co. of Pa.	$13 million
Mountain Bell	$12 million
Northwestern Bell Telephone Co.	$11 million
New England Tel. & Tel. Co.	$10 million
The Ohio Bell Telephone Co.	$10 million
Michigan Bell Telephone Co.	$9 million
The Chesapeake & Potomac Tel. Cos.	$9 million
Total national in top 12 directories	**$204 million**

Source: Marketing & Media Decisions estimates.

Twelve biggest national Yellow Pages advertisers

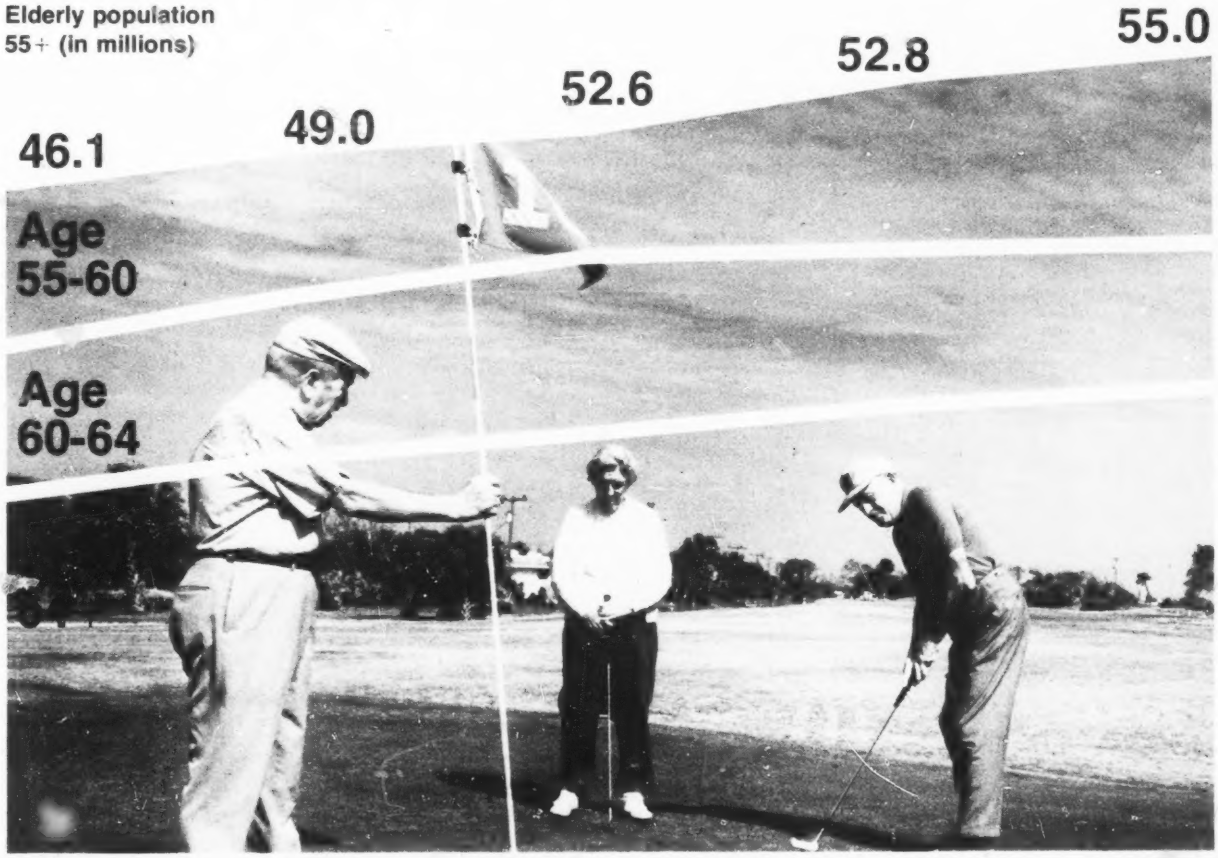
U-Haul	$ 4,200,000
Chevrolet	3,500,000
Budget	1,700,000
Ryder	1,500,000
Ford Motor	1,500,000
Chrysler	1,400,000
Bekins	1,200,000
Hertz	1,000,000
Pontiac	1,000,000
United Airlines	900,000
IBM — OPD	850,000
American Airlines	800,000
12 company total	**$19,550,000**

Source: Marketing & Media Decisions estimates.

MARKET WITH A FUTURE

Retirement

Many people now retire only partially, and delay quitting past 70. With high cost of raising children behind them and more dual incomes than ever, luxuries at home and travel abroad can be realized. Marketers are taking a new look at this segment.

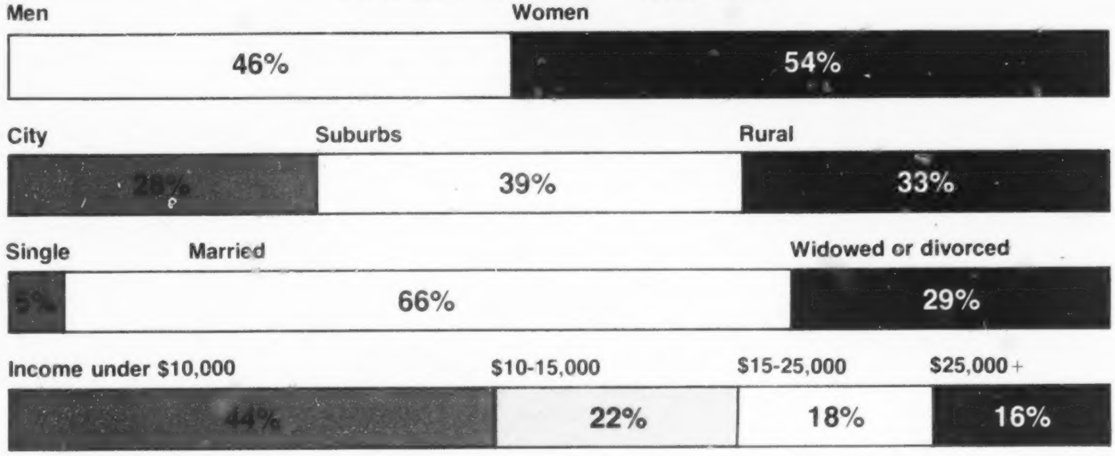


	1980	1985	1990	1995	2000
Age 55-60	11.4	11.1	10.4	11.7	13.1
Age 60-64	9.8	10.6	10.4	10.3	10.1
Age 64+	24.9	27.3	29.8	30.8	31.8
Age 55+	46.1	49.0	52.6	52.8	55.0

Source: U.S. Census Bureau.

BEST AVAILABLE COPY

Profile of 55+ market



Source: SMRB 1979

Researchers in agencies are busy evaluating the effects of the Age Discrimination Employment Act (ADEA), which became effective January 1, 1979. This Congressional measure extended the civil mandatory retirement age from 65 to 70 years of age.

How does the act change the thinking of marketers about the retirement market? In October 1977, *Decisions* pegged the 55-plus market at $200 billion a year, a picture that is certain to change with the addition of five years to gainful employment.

One example: the impact ADEA will have on Social Security and private pension systems, which in turn is tied in with the rate of personal spending by older people, and the general economy.

Emphasis currently is focused on the level of "discretionary spending" by many analysts of the 55-plus market. They tend to agree that the most noticeable effect will be added discretionary spending on non-essential items.

Included in the factors influencing trends in the 55-plus labor market, and reactions to ADEA, are:

- Inflation, which has eroded pensions, payments of Social Security and even savings to the point where many older workers will remain at work until 70 due to economic need.
- If health is good and the work interesting, the worker at 50 now has the outlook of 20 or more years of productive work.
- Employers, desirous of retaining older workers' expertise, will arrange for flexible working time and more recreational periods. There could be special sets of working periods for retirement prospects, with concurrent effects on media habits.
- The federal government may find it expedient to curb further escalation of Social Security benefits as well as payments out of employment income. Such a crimp in the Social Security system could further discourage early retirements.

Of course, contrary trends exist in the work place as well. One deterrent to older workers remaining on the job are unions, which have always urged membership to retire after 30 years or so, with pensions. The unions want younger members to get a crack at vacancies, and worry about layoffs in case of corporate retrenchment.

Some managements regard the "second career" and flexible hours concepts as disruptive, arguing that it's easier to deal with younger workers during times of change.

So, like any transition in general work patterns, this one is likely to produce controversy and cause sparks.

Where the agencies come in

In the last year, a number of agencies have analyzed the medium and upper-income end of the senior citizen market. Among those studying the importance of marketing trends here are Compton, Doyle Dane Bernbach and Kenyon & Eckhardt. Both Grey and Young & Rubicam have such studies in the works.

Compton and DDB each made 50 their take-off year, while K&E zeroed in on the 45-plus market.

However, none of the studies extend their outlooks to include research on the effects of legislation extending mandatory retirement age to 70.

The reason: it hasn't been easy thus far for agency researchers to talk top management into budgets for studying marketing prospects of population segments above and beyond 18-49.

Viewpoints on retirees

Nonetheless, a number of top researchers sounded off on the retirement market for *Decisions*.

Larry Light, executive v.p. marketing, research at BBDO has a knack for springing new marketing concepts and catch terms to go with them. He offered his latest thoughts on the retirement area:

"America is in the marketing age. The seller measures the message to the buyer not so much in terms of the elderly buyer's years, but rather in terms of his feeling that he's getting older — or staying younger.

"The up-in-years are being measured by a yardstick that's dated.

BEST AVAILABLE COPY

Elderly Audiences' Television Usage

(Index 100 is average for all adults)

	55-64		65+	
Day Part	Total Viewers	Index	Total Viewers	Index
7-10 am	2,708,000	105	3,654,000	129
10 am-1 pm	2,862,000	100	4,229,000	130
1-4:30 pm	4,091,000	91	5,328,000	108
4:30-7:30 pm	7,777,000	118	8,854,000	122
7:30-8 pm	9,891,000	117	11,557,000	124
8-11 pm	9,466,000	105	10,421,000	105
11-11:30 pm	7,137,000	111	8,077,000	114
11:30 pm-1 am	2,546,000	103	2,643,000	97
Prime Time:				
M-F 8-11; Sat-Sun: 7:30-11 pm	9,400,000	109	10,330,000	108
Early News	11,546,000	112	10,680,000	93
Late News	8,806,000	101	7,803,000	81
11 pm-1 am	3,457,000	84	3,208,000	74

Both the 55-64 and the 65+ do their heaviest viewing in the early news time, primetime and late news. They dwindle in a big way after that. The daytime peak of viewing for the 55+ span is after 1 p.m. and toward the early news. The early news habit seems to be deeply ingrained with the older set.

Newspaper Usage By Age Segments

(Index 100 average for all adults)

	55-64		65+	
	Men	Women	Men	Women
Reads Any Daily	110	113	104	97
Reads Sunday Paper	106	102	96	90

Heavy Media Usage Among 55 Plus

Medium	Number	Percent of 55-plus
Heavy magazine readers	4,762,000	11.0%
Heavy newspaper readers	8,483,000	19.0
Heavy radio listeners	6,506,000	15.0
Heavy tv viewers	12,775,000	29.0

Source: Simmons 1979 Study of Media and Markets. "Heavy" connotes top quintile

"In keeping with the Age of Me, people have become interested in who they are, rather than in who they are not.

"We're now marketing to people who both act and think younger than their age might have formerly dictated.

"Instead of measuring people by physical attitudes, they're being measured by their 'sensitivity to feeling.'

"Americans are revolting against being quantified as just a number. They want their feelings to be known and evaluated. They don't want to be treated as a 70-year-old is supposed to feel — they want to be treated as a 70-year-old actually *does* feel.

"As people get older, they don't necessarily run out of money — they've got Social Security, pensions and profit-sharing.

"Marketers don't market to age, but to money. People who feel young will buy products that have comparable appeal to younger people."

Dr. Ruth Ziff, Doyle Dane Bernbach marketing director: "We've come to call the 50-to-70 span 'The Mature Period'. There are over 22 million women who, according to our agency's research, represent a growing market. They are active, with an assortment of interest. They're intent on pursuing the good things in life.

"For the marketer this offers an opportunity to place more interest on the needs of that age segment and above all talk through advertising directly to it about his products.

"It will be found that there are products that can be directed to their specific needs — like food, health, cosmetic items.

"Of essential importance to the marketer is the fact that about half of today's 'Mature Women' are employed outside the home and otherwise active outside the home. Likewise their media habits call for selective messages to which they'll respond."

Robert Morrison, Ted Bates senior vp-research director: "I've recommended to our management that we do an in-depth study of the impact on marketing of the fast growing population in the upper age brackets, with regard to income, lifestyle, tastes, new needs.

"Target of marketing by age seg-

Continued on page 124

ments is fast shifting and marketing should become posed for changes.

"Consumption of many products are becoming more popular with older groups and the marketer should address these segments. Their needs and product preferences are undergoing change.

Paul Moros, Compton Agency Marketing Director: "It took a little while for the 50-plus market to be recognized for its size, mobility, affluence and lucrative potential.

"It's become a hedonistic market. The tendency in advertising has been to treat this older population as not so interested in the better things of life as those on the lower age levels. Not so any more.

"Group sessions we conducted dissolved many preconceived ideas that people in marketing had of the elderly. We found that a great percentage of those in the upper 50's and 60's are available for lots of luxury items, expensive household appliances, furnishings and other items, products relating to their personal appearance.

"Our inquiry revealed that quite a number of men don't like the idea of retiring and that they feel their years of productive service and expertise have been nudged into a standardized level of retirement, despite differences from the norm.

"Our study also revealed that many men are worried about retirement in view of the eroding effects that inflation might have on their savings, outside income and their accustomed quality of life style."

Seymour Banks, vp-research Leo Burnett: Media and marketing have by steps come to look upon the 50 and 60-year olds as good prospects for quality products and services.

Now it's up to media and marketing to extend this recognition to the 65-70 group.

"It's a fundamental philosophy of marketing that there is no such thing as an absolute media choice. Target groups are flexible and so are audience composition.

"The age groups frequently marked off at introduction of new and expensive products have been the elderly on

Radio Usage By Format

(Index 100 is average for all adults)

	55-64		65+	
Format	**Men**	**Women**	**Men**	**Women**
Progressive rock	11	25	16	25
Beautiful music	158	153	138	118
Classical	148	73	60	75
Black	56	28	40	46
Country	97	86	99	80
Disco/contemporary	37	67	37	57
Middle of the road	114	140	119	126
News	156	151	163	140
Oldies	93	67	54	124
Religious/gospel	55	85	113	101
Top 40/soft rock	44	44	50	32
Contemporary	75	101	69	80
Talk	159	146	139	168

Top 10 Magazines By Percentage Of Market Reached

MEN	55+	55-64	65+
Reader's Digest	38.1%	41.2%	34.7%
Sunday	27.7	28.8	26.6
Parade	26.5	28.2	24.7
TV Guide	21.9	26.9	16.7
National Geographic	19.5	23.1	15.8
Better Homes & Gardens	12.9	15.3	10.3
Family Weekly	11.5	14.5	8.2
Newsweek	11.5	14.5	8.3
Popular Mechanics	10.6	13.8	7.3
WOMEN			
Reader's Digest	40.2	43.4	37.7
Better Homes & Gardens	27.6	34.2	22.3
Sunday	27.0	31.1	23.8
Family Circle	26.4	34.2	20.1
Good Housekeeping	26.2	31.2	22.1
TV Guide	25.4	28.8	22.6
Woman's Day	25.4	32.9	19.4
Parade	23.9	27.8	20.7
McCalls	23.7	28.0	20.3
Ladies Home Journal	22.7	26.6	19.5

Source: MRI Spring 1980.

the theory they haven't the necessary affluence and lifestyle. This has been found many times to be off focus, and marketers have missed potentially good areas."

George Cruikshank, vp-Morgan Guaranty Trust Co. of N.Y.:

"Our trend newsletter recently noted that "severe inflation and changes in Government and corporate attitudes toward older workers are making retirement a less alluring prospect and that the '80's will see a rising participation rate of older workers in the labor force, because of the low birthrate in the last two decades.

"Well, any sharp swell or pressure in the national economy is of concern to the banking industry. We think that the growing presence of the older worker in the labor force has broad economic implications. Anything of such significance is of concern to the banking industry, which is certain to keep its eyes on that trend."

Allen Gottesman, Value Line marketing and advertising specialist: "The older peoples' role in the market place keeps growing by leaps and bounds, but manufacturing and marketing managers aren't fully aware of the marketing opportunities.

"The people at the ad agencies, with some exceptions, are 'waiting for it to happen'.

"The 55 to 70 circle is coming into a lot of spendable income for bigger ticket items in the open market, including fashions, out-of-home dining and recreations.

Product Usage By Elderly

(Index of 100 is Average of all adults)

Drugs	55-64	65+
Headache Remedies, pain relievers	97	91
Cold, sinus, allergy remedies	82	67
Indigestion remedies	104	105
Laxatives	122	146
Mouthwashes	107	110
Women's Personal Care	100	95
Complexion care products	87	89
Bath oil, other bath additives	88	91
Face creams and lotions	104	99
Dieting	98	81
Coffee		
Regular ground	107	95
Decaf, instant, freeze dried	120	120
Non-decaf instant, freeze dried	105	92
Liquor		
Domestic dinner/table wines	108	76
Port, sherry, dessert wines	121	86
Bourbon	100	64
Scotch	97	73
Rye or blended whiskey	109	78
Vodka	97	64
Travel		
Any domestic trip past year	99	73
Scheduled plan	103	69
Charter plan	109	48
Foreign trip past 3 years	105	84
Scheduled plane	118	60
Charter plan	132	68

Source: MRI Spring 1980

Publications for the elderly

Magazines and newsletters aimed at the pre-retirees and the actually retired and their married mates keep proliferating. More of them are making themselves available for advertising.

The general quality of the editorial content and production of the magazines continues to improve and the number of ad pages and diversity of products advertised have been increasing.

50 Plus, previously *Retirement Living* and before that *Harvest Years*, is the leader of the pack in circulation (around 200,000) and advertising (330 pages in 1979).

The name was switched to *50 Plus* on the theory that it is at least at the age of 50 that the male of the species starts taking an evaluative look at himself as to where he's been, where he is now and what he should be looking forward to from here on out.

50 Plus leans to articles involving money (taxes, Social Security, pensions and the like), Washington developments of concern to the retired, recreational and how-to narratives, and occasionally an exposé about the ripping off of Medicare.

A relatively newcomer to this roster of upper-age magazines is *Prime Time*.

The target audience is from 45 upwards, with at least an income of $40,000 a year, with literate appreciations and upscale tastes in products and services.

It had 30 ad pages in the October issue and 32 in the November issue. The ads predominantly deal with travel plus occasional liquor and cigarette brands. An automotive, Pontiac, joined the October issue.

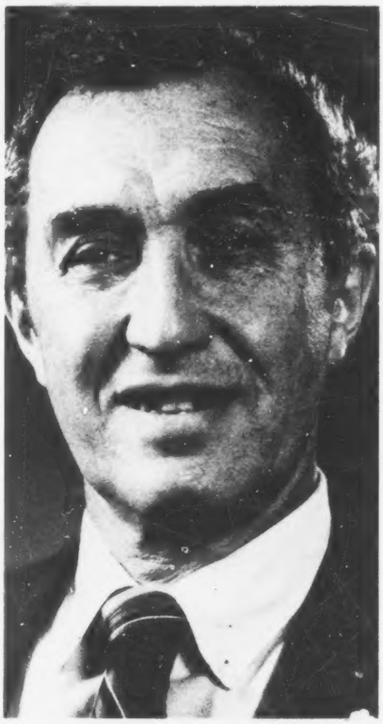
The field also has its own publishing combine, namely, the Maturity Group. It consists of four publications, which just this spring started taking advertising. The members of the group include:

Modern Maturity. Professionally put together. Controlled by the American Association of Retired Persons. Considers itself as having two markets: (1) those 55 and above contemplating retirement with incomes of between $25,000-$50,000: (2) AARP mem-

Dr. Ruth Ziff, Doyle Dane Bernbach marketing director: "There are 22 million upper-years women, who represent a growingly affluent market for personal grooming, dietary, recreational regimens, which are open to marketer response."

Larry Light, BBDO executive vp-marketing: "People want to work longer. For one thing Medicare has kept them younger."

Seymour Banks, Leo Burnett research director: "50 and 60-year olds are as prime prospects. Next step is to extend this recognition to the 65-70 bracket."



Paul Moros, Compton marketing director: "There's a hedonistic market in the upper age category, available for many luxury items."

bers, who are in the upper 60's with a median income of $12,581 and who are already retired.

Dynamic Years for working Americans in their middle years and likewise aiming at retirement. Editorial includes investment advice, keeping up with medical developments, and nostalgic articles.

NRTA JOURNAL, controlled by the National Retired Teachers Association, whose membership has an average income of somewhat over $11,000. Article titles in recent issues: "Father of Driver Training," "The Ince Cream Sister, "Plastic Surgery That Mends", "The Land Longfellow Loved".

AARP News Bulletin, delivered to 14 million association members. Seems to have extensive national coverage for retiree news, with Washington the center. The *Bulletin* is a 12×14 newspaper like format.

There are also a few "senior citizen" newsletters scattered around the country, two of them in California and one in New England.

Reporter's comment

The old pro who researched and wrote this article has long passed the traditional retirement period. His 50th year in broadcast media is but a few months away. A few comments on the aptitude of media decision makers for guiding the elderly into their proper marketing niché:

Marketers are a hardy and resourceful breed but the chances are they may not find the general run of agency planners and buyers as flexible as they'd like in adjusting their targets to include the upper age groups as prospects for many of the quality and high ticket items that appeal to the younger generation.

These planners and buyers are themselves relatively young. They grew up with tv and their interest in media tends to be oriented to the 18-39 creed.

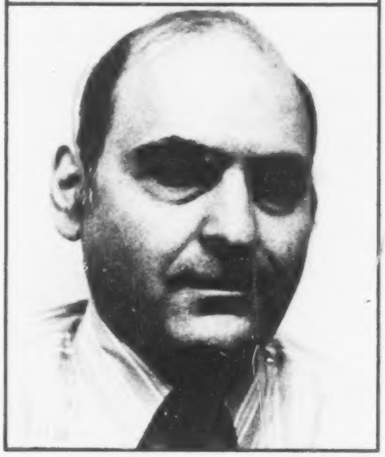
The element of youth has nourished and activated their sense of fulfilling the client's objective, often regardless of whether this was befitting.

They talk about the elderly having problems of adjustment. The young people seem to have an adjustment problem of their own when it comes to evaluating their newly affluent elders.

Ben Bodec

AS THEY SEE IT

MEDIOLOGY
by ED PAPAZIAN



Through-the-book studies still seem valid

A lot of people seem to feel that the through-the-book method for measuring magazine audiences may have seen its best days. Others disagree, but while the debate rages on and on, it's curious that no one has published a historical review of the numerous through-the-book studies conducted since the 1950's to see how they are actually trending. I've just finished a rather extensive review of such data for over one hundred magazines included in more than 30 studies conducted by Politz, Nielsen, Simmons and Audits Surveys since 1954. The results are interesting and I'd like to share some of them with you.

First, it is clear that the through-the-book method, produced incredibly consistent reader-per-copy estimates for the old mass magazines. For example, in 19 studies between 1954 and 1972 *Life*'s male reader-per-copy (RPC) ratio averaged 2.4 and the maximum deviation on the high or low side was only 8%. In other words, the highest men RPC level for *Life* in one of the Nielsen studies was 2.6 while the lowest (2.2) occurred in three of the early Politz surveys. And nine of the 19 studies produced precisely the average result (2.4).

The same degree of consistancy occurred with *Life*'s women RPC ratios. In 20 studies during the same period, the average finding was 2.2. Once again, the largest deviation was a high of 2.4 in one of the Nielsen studies and a low of 2.0 in two Politz surveys.

The findings for *Look* and *The Saturday Evening Post* were equally consistent and this was also the case for the large women's service magazines, *The Reader's Digest* and *TV Guide*. As more selective publications were included in the total audience studies in the 1960's their levels quickly stabilized after a few surveys, except in a number of situations mostly featuring books with very small circulations, or those with changing formats.

The first really significant changes appeared in the mid seventies. In 1974, Simmons abruptly aborted his annual syndicated study. When it was resumed under new management, the results were somewhat different. This is demonstrated graphically by the large table on next page, which traces women's reader-per-copy levels for the seven large women's service magazines from 1954 to the present day.

As the data shows, except for the 1963 Neilsen study, there was relatively high stability in the findings, until 1974. Since that time, six of the seven books have improved their reader-per-copy ratios. As the table also indicates, however, once these new levels were established, they too have become quite stable.

A lot of magazines seem to have been affected by the mid 1970's phenomenon, while others show no change at all in their through-the-book findings. For example, *Esquire* was averaging about 4.5-4.9 men readers-per-copy, until the 1974/75 Simmons study dropped it to 2.2. Since then it fell well below the 3.0 level until it was eliminated from the through-the-book measurements. *Business Week* is another case in point. Until the mid-seventies its typical men RPC ratio was about 5.5. Then, suddenly, it dropped to the 4.0 level and, in one study fell as low as 3.7. On the other hand, magazines like *Car Craft, Forbes, Guns & Ammo, Hot Rod, Field & Stream, The National Geographic, Sports Illustrated, Newsweek, Time* and *U.S. News & World Report* have maintained their male RPC figures throughout the past decade.

Women reader-per-copy ratios have also varied from book to book. As we have noted, there has been a general tendency for higher RPC levels among the women's service magazines (*BHG* excepted) since 1974. This is also true for *House & Garden, House Beautiful* and *Glamour*, but magazines like *Cosmpolitan* and *Vogue* do *not* seem to have been affected.

It is difficult to explain some of these fluctuations. The increase in reader-per-copy rates for the women's service field may reflect the fact that some of these magazines trimmed their circulations and women who once bought copies may have continued to read them via the pass-along process. The addition of extra issues by *Family Circle* and *Woman's Day* does not appear to have impacted on their reader-per-copy rates, but there is reason to believe that the growth of the working women's population and expanding interests of women generally, may be a factor. Women RPC levels are up for magazines like *Sports Illustrated, Sport, People, Psychology Today, Forbes* and *Newsweek* but, on the other hand, this is not the case for *Time, U.S. News & World Report, Business Week, Fortune* or *The New Yorker*.

Other speculations revolve around a host of unsubstantiated theories and assumptions. One holds that some of the earlier total audience findings may have been "controlled" artificially by certain through-the-book researchers — to keep them stable. I find this rather difficult to accept, and the results themselves seem to deny it. If a researcher intended to control the data, why would he allow any "bumps" to appear? Also, similar findings recur in surveys by *four* companies, not one. Were they all in on it? I doubt it.

Another theory is that the public at large is more aware of surveys and may be responding differently than in the past. This too seems spurious. If it was true that respondents are behaving differently — in some way distorting the findings, why isn't this evident in other surveys — for tv or radio, or newspapers, or in the many marketing and copy testing studies, political and public opnion polls etc.?

A more likely explanation involves a combination of factors. First, real changes have occurred in some of the publications that were affected. Second, when a new trend develops — such as the smash success of *People* and *Cosmopoliton* or the introduction of new classes of magazines (*Self* and *Savvy; Working Woman* and *New Woman* etc.), this may impact on *other* magazines. Third, under new management, SMRB may be running its operation differently. This may involve a myriad of elements ranging from sampling, to interviewing procedures, quality control, the size and length of the questionnaire etc.

Last, but not least, the public's tastes may be changing. The reader-to-copy rates for certain classes of magazine (*Golf, Tennis, Automotive* etc.) seemed to be softening in recent through-the-book studies while they indicate more interest in *People*, for instance.

A lot of critics have cited the number of magazines included in the through-the-book surveys as a negative factor. Once they got up to the 60+ level this seemed a reasonable complaint. Several recent studies that measure only a dozen or so magazines (or less) have produced generally higher RPC levels and this was true in some of the older Politz and Audit & Surveys studies in the 1960s. But the last

Women reader-per-copy estimates for seven womens service magazines in through-the-book studies: 1954-1980

Researchers	*Year*	*BHG*	*Fam. Circ.*	*Good House.*	*LHJ*	*McCalls*	*Red Book*	*Wom. Day*
Politz	1954	2.3	—	2.3	1.9	1.9	—	—
Politz	1954/55	2.3	—	—	—	—	—	—
Politz	1958	2.4	—	2.1	1.9	1.8	—	—
Nielsen	1960	2.2	—	2.1	1.9	1.8	—	—
Nielsen	1961	2.2	1.5	2.2	1.9	1.8	—	1.5
Nielsen	1962	2.1	1.6	2.2	1.9	1.9	—	1.6
Politz	1962	—	—	—	—	1.9	—	—
Simmons	1962	2.1	—	2.2	1.9	1.7	—	1.5
Politz	1963	—	—	—	—	2.1	—	—
Simmons	1963/64	2.1	1.5	2.2	2.0	1.7	—	1.5
Nielsen	1963	2.5	2.1	3.0	2.3	2.1	2.0	2.0
Politz	1964	2.3	1.7	2.4	1.9	2.2	2.2	1.6
Simmons	1964	2.1	1.5	2.4	1.9	1.7	2.0	1.6
Simmons	1965	1.9	1.4	2.2	1.9	1.7	1.7	1.5
Simmons	1966	2.1	1.6	2.4	1.9	1.8	1.9	1.6
Politz	1966	2.3	2.1	2.5	2.0	2.1	2.2	2.0
Simmons	1967	2.1	1.7	2.4	2.0	1.9	1.9	1.7
Simmons	1968	2.1	1.7	2.4	2.0	1.9	1.9	1.8
Simmons	1969	2.1	1.7	2.4	2.0	1.9	1.9	1.8
Simmons	1970	2.1	1.7	2.4	2.0	2.0	1.9	1.8
Simmons	1971	2.1	1.8	2.3	2.1	2.0	1.9	1.8
Simmons	1972	2.1	1.8	2.4	2.1	2.0	1.9	1.8
Simmons	1973	2.1	1.8	2.4	2.1	2.1	2.0	1.8
Autits & Sur.	1974	2.7	2.7	—	—	—	—	3.0
Simmons	1974/75	2.3	2.2	3.4	2.3	2.4	2.2	2.3
Simmons	1976	2.3	2.2	3.4	2.5	2.6	2.2	2.3
Simmons	1976/77	2.3	2.3	3.3	2.3	2.6	2.4	2.2
Simmons	1977/78	2.1	2.2	3.0	2.2	2.5	2.0	2.2
Simmons	1978/79	2.1	2.2	3.4	2.2	2.6	2.4	2.3
Simmons	1979	2.1	2.3	3.3	2.3	2.3	2.3	2.3
Simmons	1980	2.1	2.3	3.3	2.2	2.3	2.3	2.2

two SMRB ventures have reduced the number of through-the-book magazines considerably (down to just over 40) without materially altering their over-all reader-per-copy rates, so the evidence on this score is clouded, somewhat.

Even if the causes are not easily identified and may involve a number of elements, it seems clear that the through-the-book measures conducted by SMRB since 1976 are reflecting a changing scene in magazine audience dynamics. In many cases, there has been virtually no deviation from the pre-1975 era. In others, new levels were quickly established and since then have held quite consistently. In some situations the flux continues and the data may be just now reflecting this.

With this in mind an overview of the last few SMRB studies, presents a surprisingly stable picture. To determine this, I analyze the adult RPC levels for 48 magazines which appeared in at least three SMRB studies between 1976 and 1980. In each case I took the last three through-the-book measures available and contrasted the highest and the lowest figures. In effect, this produced the *maximum* range within which the RPC levels varied over a three year period. The results are, I think, interesting.

Over-all, the *maximum* variation for the average magazine's RPC level was 18%, but when the publications were arrayed by size (based on circulation) a considerable difference was apparent in the findings. As the table below indicates, small circulation magazines were much more likely to suffer from RPC bounces! This was especially evident below the 600,000 level but above that — up to those at the 1,800,000 circulation level — the deviations seem to plateau. As the larger books appear, the "bounces" drop to almost insignificant amounts. Demographic distinctions (I analyzed age and income) followed almost in step. The largest magazines, do not suffer much from the bounces that affect those under 1,200,000 and especially those under 600,000.

So is the through-the-book concept dead?

As far as I can determine, there is very little evidence to support the notion that this measurement technique is outmoded or so error-prone that it is no longer viable. If publishers insist on treating through-the-book measures as if they are audits (not surveys), examining their findings in minute demographic detail and expecting perfect consistency, their expectations are plainly unreasonable. You can't ignore sample size factors or the fact that actual charges may be taking place when dealing with such surveys.

Used and interpreted reasonably, however, the method seems to be just as valid as it was a decade ago — especially for magazines with circulations of a million or more. Below this, however, fluctuations and bounces occur. Small sample bases explain most of them.

New magazines also must play the game warily. Sometimes it takes several years to screen-in enough potential readers before the actual audience questions are asked. Changing formats or circulation levels are also a problem for the researchers. Here also, it may take a year or two for the studies to reflect their audiences properly.

How adult reader-per-copy levels varied for the last three available through-the-book SMRB studies (1976-1980)

Approximate Circ. level (000)	*Number of magazines*	*Maximum adult RPC deviation* (Avg. magazine)*
Under 600	6	37%
600-800	7	22%
800-1,200	8	23%
1,200-1,800	6	25%
1,800-3,000	6	10%
3,000-5,000	8	9%
5,000 and over	7	6%
All Magazines analyzed	48	18%

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* Over a three study interval.

Other methods, of course, exist and must pass the test of validity and logical expectations. I'm not saying that the through-the-book technique is the only way to go, but it does not seem to be producing generally nutty or wildly erratic data, as some of its critics have implied. While some of the data are perplexing, most of the findings are both reasonable and consistent. So I for one, see no reason to panic and abandon through-the-book unless a *better* alternative is developed. ■

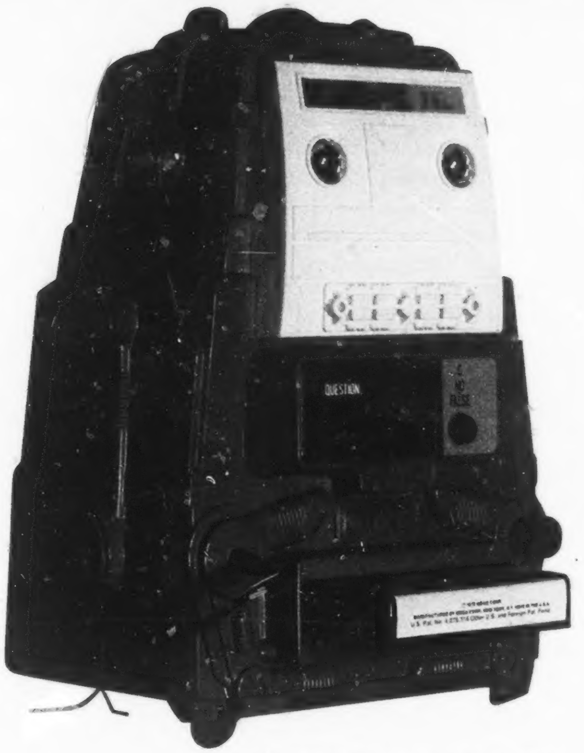
MARKETING
by JOSEPH OSTROW
exec. vp-director of communications services, Young & Rubicam.

Shorter tv commercials — panacea or problem?

The escalating costs of media, especially in relationship to television rates, continues to focus attention upon the utilization of shorter length commercial messages.

While there has been some abatement in these increases of late, rates continue to go up and thereby push advertisers and their agencies into a re-evaluation of the use of ten, fifteen or twenty second commercials. Supporting this consideration is the seemingly easy transition from sixty second to thirty second commercial lengths that has taken place over the last several years.

Additional support for the move to shorter length commercials comes from some analysis of commercial re-



Mego's educational electronic toy, 2-XL.

Brand report 60:

Toys & games

Toy companies are putting more money into spot television to sell the wide array of new electronic toys and games now flooding the market. But just how many of these sophisticated, high priced toys sell this holiday season is the big question. Industry executives are bracing themselves for a major shakeout, and manufacturers and retailers are tense.

There are robots programed to teach children history and math, board games that talk back to players, space ships equipped with electronic buttons and flashing lights and dolls that coo and squirm at a touch of a child's hand. There is an avalanche of hand-held electronic sports games, word games, chess, cards and backgammon. There's even an electronic horse, and auto racing.

Toys have, in short, undergone a dramatic electronic revolution. While Barbie and Ken and even Raggedy Ann are still selling well, the new battleground centers around electronic games and toys now flooding the market. A giant step up from battery operated items, electronic toys are run by microchip technology. The "miracle chip" is in a tiny computer which can perform a multitude of functions.

BEST AVAILABLE COPY

Toy companies introduced a rash of new electronic items in 1978 and 1979. Sales at the manufacturers' level increased by 300% last year. But sales this year may not be as spectacular. Industry sources say they are expecting a major shakeout in electronics this Christmas. Retailers, still stinging from a slow summer, have held back on orders and are waiting to see how inflation weary consumers respond to these toys, which range in price from $20 to $70.

Top Game Advertisers in 1979

Games	Total	Magazines	Network tv	Spot tv	Network radio	Newspapers
Milton Bradley	$19,000,000	—	$ 354,000	$18,600,000	—	—
Parker Brothers (General Mills)	7,800,000	$336,000	6,000,000	1,400,000	—	—
Ideal	6,200,000	—	3,600,000	2,600,000	—	—
Hasbro	5,400,000	—	363,000	4,900,000	$157,000	—
Mattel	4,000,000	12,000	1,700,000	1,900,000	—	$450,000
Lakeside	3,600,000	—	124,000	3,500,000	—	—
Gabriel (CBS)	2,300,000	52,000	890,000	1,400,000	—	—
Total	**$48,300,000**	**$400,000**	**$13,031,000**	**$34,300,000**	**$157,000**	**$450,000**

Sources: LNA/BAR/Media Records

Still, electronics have proven a boon to the toy industry. Their phenomenal growth contributed to the 13% increase in sales last year. Consumers spent $5.8 billion on toys and games in 1979 with $500 million of that in electronics, (excluding video games), according to the Toy Manufacturers of America. The hottest items were indoor electronic sports games, which represented 45% of unit sales in the electronic category. Dollar volume so far this year for the whole industry is equal to last. However, if price increases are figured in, that means that unit sales are down a bit.

Advertising expenditures totaled $244 million in 1979, up $35.5 million or 17% over 1978. Spot television received 59% of the budget, network television 32.5% and magazines 7.4%. The biggest increase was in spot television which totaled $143.3 million or $21.7 million more than in 1978. For the first half of 1980, toy companies spent $50 million which is up about $7 million over the same time period in 1979.

While toy companies are starting to advertise year round, the fourth quarter remains the most important time. About 70% of all ad dollars are spent between September and December. Spot television remains the favored medium because advertising is tied to product distribution. Magazines are strong for preschool items with advertising directed toward mothers.

The industry has become much more sophisticated both in the products it produces and the marketing strategies it employs to sell those products. "Toys are different today because kids are different," said one toy marketer. "Children are exposed to more. They read magazines, watch television. They travel and they're inundated with information from many different sources. Toys have to reflect that. Toys are fun because kids are able to get a lot more out of them." One reason for the success of the electronic games, says this executive, is "kids are ready for them . . . they can handle them."

Electronic items have opened up the toy market to a broader and more selective audience. Toy companies are now directing their advertising to an audience ranging in age from four years to adult. More and more adults are buying games for themselves as well as their children. Also, parents today are more educated than previous generations and are more careful in the types of products they purchase for their children.

There are other factors affecting the industry. In a survey of the industry conducted a few years ago, *Playthings* magazine reported that toy volume has grown in proportion with personal income and not necessarily with child population. The study also stated that as "more women move into the work force, more children are spending more time with surrogate parents such as sitters and nursery schools. This must affect toy sales," said the magazine. "Separated or divorced parents who take care of children in turn or have visiting privileges tend to buy more presents, often in off-season periods."

Still, the Christmas season represents over 60% of toy sales. It also touches off a barrage of television advertising that one toy marketer calls "staggering. In the six weeks between Thanksgiving and Christmas, you'll see 60 or so manufacturers throwing everything they've got into the marketplace, They'll hit the tube, all looking for industry dollars." He noted that advertising of electronic games will be especially heavy this year since many of the items did not sell during the "impulse" or non-Christmas season. Also, two of the biggest electronic game companies, Mattel and Coleco are offering rebates, with purchases to spur sales.

The biggest advertisers in the toy and game category are Kenner, Mattel and Milton Bradley. These three spent about $25 million each in media last year and at least one of them, Milton Bradley, increased its budget substantially in 1980. The second biggest spenders are Hasbro, Ideal and Mego.

BEST AVAILABLE COPY

Major Toy Advertisers 1979

Toys	Total	Magazines	Network tv	Spot tv	Network radio
Kenner (General Mills)	$18,000,000	$ 265,000	$10,800,000	$ 6,900,000	—
Mattel	13,000,000	354,000	7,100,000	5,500,000	—
Fisher-Price (Quaker Oats)	9,000,000	3,200,000	5,400,000	—	$460,000
Tomy	7,900,000	214,000	2,300,000	5,400,000	—
Hasbro (includes Romper Room toys)	7,800,000	—	610,000	7,200,000	—
Milton Bradley (Playskool)	6,800,000	617,000	435,000	5,800,000	—
Mego	6,200,000	—	1,200,000	5,000,000	—
Ideal	3,900,000	—	1,400,000	2,500,000	—
Sub-Total	**$72,600,000**	**$4,650,000**	**$29,450,000**	**$38,300,000**	**$460,000**

Sources: LNA/BAR/Media Records

Major Doll Advertisers in 1979

Company	Total	Network tv	Spot tv
Mattel	$ 8,800,000	$ 3,900,000	$ 4,900,000
Mego	7,800,000	1,800,000	6,000,000
Kenner	6,000,000	3,400,000	2,600,000
Ideal	3,750,000	950,000	2,800,000
Total	**$26,350,000**	**$10,050,000**	**$16,300,000**

Sources: LNA/BAR/Media Records

This group poured about $15 million each into major media. Coleco, which is fighting Mattel for the number one spot in electronic sports games, doubled its ad budget in 1980 to $7 million and plans to spend "a lot more money in media," in 1981 to promote several new electronic and nonelectronic games, according to Michael Katz, vp-marketing.

Milton Bradley

The Springfield, Mass. toy giant is pushing the electronic and 24 nonelectronic games this Christmas as well as six items from its Playskool line. But perhaps its most interesting new toy this season is Milton, a saucer shaped memory toy which talks to the player. Milton's deep voice prompts players to complete sentences the game begins. The company hails Milton as the first "speech-synthesis" game and is hoping consumers will part with about $65 or so to buy the item.

Other MB games and toys include the Simon line which include Super Simon and Pocket Simon; there's also Avenger Intruder and Big Trac. In the Playskool division, MB will put ad support behind Alfie, "an amazing electronic robot" Major Morgan, Paramedic, Lincoln Logs, Toddler trucks and taxis, Bristle Blocks and Fetch-it Freddie. Freddie will be advertised on Captain Kangaroo and supported by local tv programs running during the week.

John Payson, executive vice president of MB Communication, the in-house ad agency, noted that the Milton Bradley game line will be advertised on primetime shows on all three networks as well as local all-family time. Some games will be advertised on Saturday morning network shows and local programs. Regular and electronic games will be advertised on such primetime shows as *Dukes of Hazzard, Eight is Enough, That's Incredible, Charlie's Angels, Three's Company* and *Chips*. The Playskool division will get an extensive print campaign in women's magazines.

Milton Bradley increased its ad budget $9 million last year to $26.6 million. The increase went almost exclusively to spot television. The electronic game division rose $2.4 million to $4 million, according to Leading National Advertisers. Regular games hit $13 million, up $3 million over 1978 and Playskool toys budget hit $7 million, up $2.7 million.

This year, the company is relying on more network television than in the past in order to build sales, according to Payson. One indication of just how aggressive MB has become is its budget for the first half of 1980 which hit a little over $6 million, according to LNA. That is $4 million over the previous year.

Mego Corporation

Recovering from a bad year, Mego's ad budget will dip to between $10 and $12 million this year from almost $16 million in 1979. The company plans to trim its product line and concentrate its advertising on fewer items. The media buy will be "all television, . . . mostly spot," says Allan Chernoff, vp-marketing. The adult items which would include electronic games will get network tv.

Chernoff says Mego is "going back to basics in what made our business in the past." That means a heavier emphasis on licensed toys such as Mego's Black Hole line, Dallas, Chips and Buck Rogers. The company offers a line of Chips characters and a Dallas dart board which has J. R. Ewing's face on it. There's also Dallas card game.

Mego's major electronic toy is 2-XL, which was first introduced in 1978. A talking robot who tells jokes,

"We're using more network television this year for both our electronic and regular games."
— John Paysen, Milton Bradley

2-XL asks true or false and multiple choice questions, plays music and sings. He comes with a series of 8-track tapes and retails for $49.95.

Mego plans to tap a whole new market by pushing the educational nature of 2-XL. The company has introduced a new series of programs and supportive materials geared towards the needs of educators. The media strategy may include greater use of specialized magazines for educators, and a direct mail campaign. "The plan is the antithesis of television" says Chernoff.

Coleco

While its ad budget is substantially less than its competition, Coleco has nevertheless managed to grab 20% of the hand held and tabletop electronic game market. The fiercely competitive toy company is now second to Mattel in this category and plans to close that gap soon.

Michael Katz, Coleco's vp-marketing director, noted that the company is putting most of its ad dollars behind the successful Head-to-Head Sports games and the Play & Learn products. Of the five games included in Head-To-Head, baseball and football will receive the heaviest ad support. A hard-hitting, comparative advertising campaign pushes the electronic sports games, with Coleco stressing the advantages of its games over Mattel and other competitors.

The media buy includes top rated sports programs such as the World Series. The company also uses early and late fringe and primetime. To give its products added appeal to retailers and consumers, Coleco is conducting a major promotion with Ray-O-Vac Battery. The promotion is backed by a million dollar television campaign.

With its Play & Learn line, Coleco is concentrating on two products – Quiz Whiz, a computer question and answer game, and the Electronic Learning Machine. The latter product is a computer for children which "makes learning fun." It teaches math, spelling, music and also recites riddles. The Electronic Learning Machine is targeted towards the five-to-nine year-olds.

Coleco will also support its children's line of products with a major ad campaign. That line features Holly Hobby Oven, Merry Go Round Stroller, a new doll carriage.

Parker Brothers

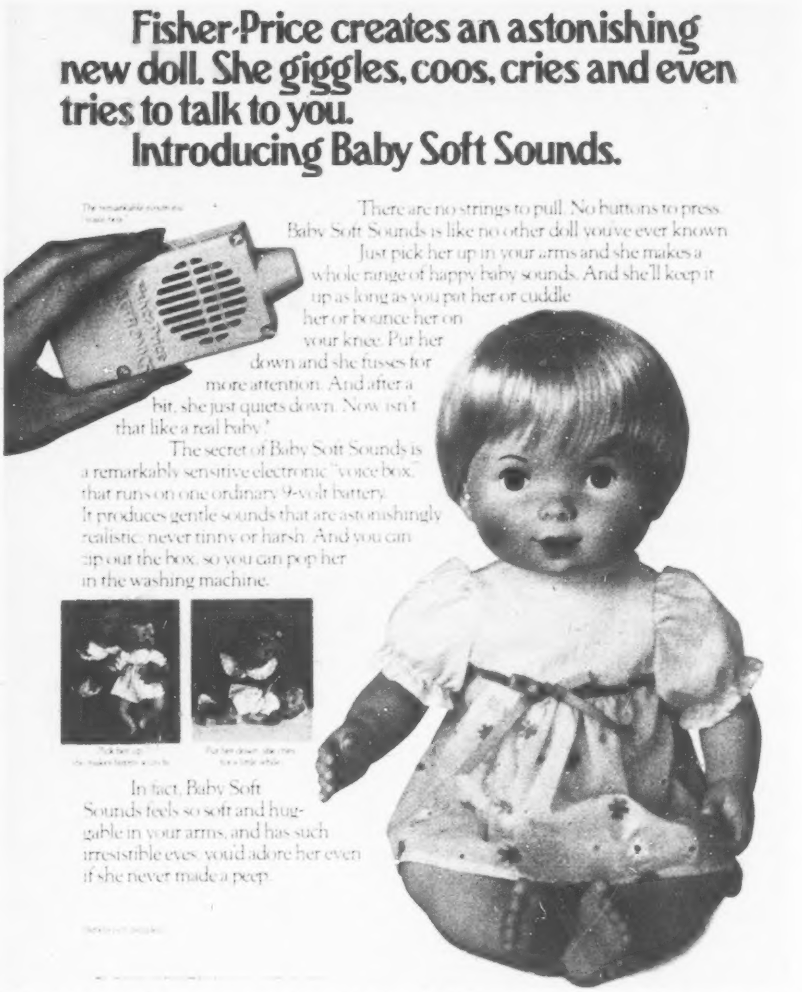
The company that gave the world Monopoly, Risk and Clue is now firmly entrenched in the electronic game category. Two years ago it introduced Merlin, a hand held electronic game that offers six different games in one. Merlin featured Tic-Tac-Toe, and Blackjack 13. There's also Echo, a musical memory test, and Mindbender, a random-number strategy game. Magic Squares is a mind twister puzzle game in which the player must deduce the key to a pattern of flashing lights. Merlin also plays back scores of electronic tones programed by the player.

Another popular game is Stop Thief, which was also introduced about the same time as Merlin. Stop Thief is an electronic, detective board game which emits different sounds such as breaking glass, creaking floors and police sirens. The player uses these sounds to track the thief around the board.

New this year is Wild Fire, a hand held pinball game which retails for $40 to $50, Split Second, a multi-game system and Bank Shot, a hand held electronic pool game. Parker Brothers is still committed to traditional board games. It has introduced a few new games such as Ruff House and Can't Stop, a new dice game.

Robert Kelsey, director of marketing communications at Parker Brothers, says the ad budget is evenly split between the electronic and traditional games. The primary medium is net-

"In 1981 we will increase our program of new products. This will mean a lot more money in media."
— Michael Katz, Coleco



Fisher-Price creates an astonishing new doll. She giggles, coos, cries and even tries to talk to you.
Introducing Baby Soft Sounds.

There are no strings to pull. No buttons to press. Baby Soft Sounds is like no other doll you've ever known. Just pick her up in your arms and she makes a whole range of happy baby sounds. And she'll keep it up as long as you pat her or cuddle her or bounce her on your knee. Put her down and she fusses for more attention. And after a bit, she just quiets down. Now isn't that like a real baby?

The secret of Baby Soft Sounds is a remarkably sensitive electronic "voice box" that runs on one ordinary 9-volt battery. It produces gentle sounds that are astonishingly realistic, never tinny or harsh. And you can zip out the box, so you can pop her in the washing machine.

In fact, Baby Soft Sounds feels so soft and huggable in your arms, and has such irresistible eyes you'd adore her even if she never made a peep.

Fisher-Price this year introduced Baby Soft Sounds, the first electronic doll. Backed by an extensive print and tv campaign, the doll is targeted towards mothers with children under six. Ads for a black Baby Soft Sounds appeared in the November issue of *Essence* magazine.

work television and the daypart is "kids time" or Saturday and Sunday early morning. PB also uses some network primetime and late night. "We use some print," says Kelsey, "and we also have special promotions. But the bulk of the money is in network tv. We believe in network television. It targets accurately for us and it offers an uncluttered environment for our products. Spot tv is more of a hodge podge. Network offers a better showcase for us and we've had a great deal of success with it." Most of the Parker Brothers games are aimed at an audience ranging in age from seven years to adult.

Mattel

The Hawthorne California based toy giant is one of the few major toy companies involved in both the programable home video systems and the hand held electronic toy and games. Mattel Electronics, which markets Intellivision, spent $2 million in major media for the first half of 1980. The high-priced home entertainment system was backed with a $200,000 magazine campaign, $880,000 in network tv and $300,000 in spot tv.

For its toys and games, Mattel spends its media dollars almost evenly between spot and network television with a small percentage in magazines. A big chunk of its money is going towards the eight new handheld electronic games it introduced this year. Mattel uses network tv, including sports programing, for its electronic sports games and also relies on special promotions. In one done with Gillette last year, the company offered a $3 rebate on its electronic baseball game if a customer showed proof of purchase of the game and Gillette razor blades.

Some of Mattel's new electronic games include Brain Baffler with eight word games; Horse Race Analyzer which allows players to plug in vital racing information to eliminate betting errors; and Computer Gin, which features liquid crystal display producing recognizable miniature cards on screen. There's also The Horoscope Computer which forecasts the future according to birth signs.

Mattel's Barbie doll is still a very strong item after 21 years in the market. And Barbie has benefited from the advanced technology in toys. Now her poses are automated with moving arms, legs and hands. This year Mattel introduced Beauty Secrets Barbie. The doll comes with a beauty kit that enables the child to brush and blow dry Barbie's hair. Barbie gets a spot and network television campaign with some Saturday morning and access time to make the doll visible to parents.

> **"Beauty Secrets Barbie comes with a blow drier for the doll's hair."**

Mattel also introduced Starr, a teenage doll aimed at girls six to 10 years old. Starr was created to fill a gap in the doll market, according to Fox. While there are baby dolls and adult dolls like Barbie, there were no dolls which captured a child's fascination with high school and teenage life.

Fisher-Price

Fisher-Price introduced two new electronic toys this year, both of which will get substantial ad support. The toy company brought out Baby Soft Sounds, the first electronic doll, and Alpha Probe, a space vehicle with an electronic sound system that signals "blast off" communications and red alert. It comes with a male and female pilot, a life support cable for space walking and docking, a Recon sled and a rocket power module.

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Anacin
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Bulova Watches
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Goya Foods
Greyhound
Gulf Oil
Irish Spring Soap
Kraft Foods
Libby's Nectar
Lipton Soup
McDonalds
Mazola Oil
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Baby Soft Sounds responds automatically to touch. When she's held, cuddled or patted she makes a range of happy baby sounds. Put her down and she cries and then quiets. The doll operates on an electronic voice box which can be easily removed to make her machine washable.

Both toys are advertised to mothers or women 18 to 34 with children under six for the doll and six to 11 for the space ship. The media plan involves daytime and late night network television. "Our primary thrust is daytime to reach the mothers at home," said Mary Lou Benjamin, vp-assistant media director at Waring & LaRosa, Fisher-Price's agency. "We use late night to reach working mothers."

Baby Soft Sounds is getting a heavier print campaign than Alpha Probe. Full page, four-color ads and two-page spreads are appearing in several women's magazines. The list includes *Better Homes & Gardens, Family Circle, Good Housekeeping, McCall's, Redbook* and *Woman's Day*. A black Baby Soft Sounds is advertised in *Essence* magazine.

Meet Alphie & Freddie...
they've got something to teach.
PLAYSKOOL

Milton Bradley is marketing electronic robot called "Alphie" and Fetch-it Freddie.

Hasbro Industries

Despite the hoopla surrounding electronic games and toys, Hasbro has stayed away from the category until this year. "We wanted to make sure when we entered electronics, we did it right," said Steve Schwartz, vp-marketing director at Hasbro.

And the right item for Hasbro is the Snoopy Playmate, an electronic game aimed at the preschooler. Snoopy acts as an organ which records and plays back music. It's also a memory game. It retails for $39 to $49 and is being backed by a two-tier ad campaign. Commercials are directed towards children via the Captain Kangaroo tv show and towards parents of preschoolers via primetime network television.

Other items getting strong ad support from Hasbro are Fresh & Fancy, a cosmetic set where girls make up their own cosmetics and then apply them; Ruff Truks, a totally steerable truck with a stick shift controlled by the driver; Hungry Hungry Hippos and Quick Jump It's a Skunk, two 3-D skill and action games. Hasbro also brought out this year Sewesy, a sewing machine for preschoolers and My Puppy Puddles, a toy puppy which actually drinks and wets.

Ruff Truks is getting a spot tv campaign with spots running 7 to 9 a.m. and 3 to 5 p.m. Monday through Saturday. The other items are getting spot tv campaigns plus Captain Kangaroo. "We did not use print this year," said Schwartz. "We felt it was more important to put the money into television to establish the line. Now that the line is established and we have a good base to build from, we can go back into print."

The marketing director noted that Hasbro, which spent $15 million in 1979, according to LNA increased its ad budget by 20% in 1980 to total $18 million. The budget will go up another 20% in 1981, according to Schwartz.

Ideal

Despite a bad 1979, Ideal's ad spending is up slightly for the first half of 1980. Last year the company put 64% of its $14 million ad budget into spot television and the remainder into network. All media dollars went into spot tv for the first half of this year.

Ideal also introduced some lower priced toys, including a new doll called Pretty Curls, a game called Alligator and auto racers entitled Guzzlers. The toy company is turning to cable tv Entertainment & Sports Programing Network for its new electronic game, Flash.

Cheryl Lechten

JANUARY 1981 • $3.00

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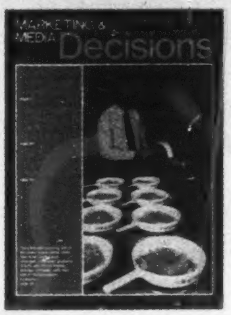

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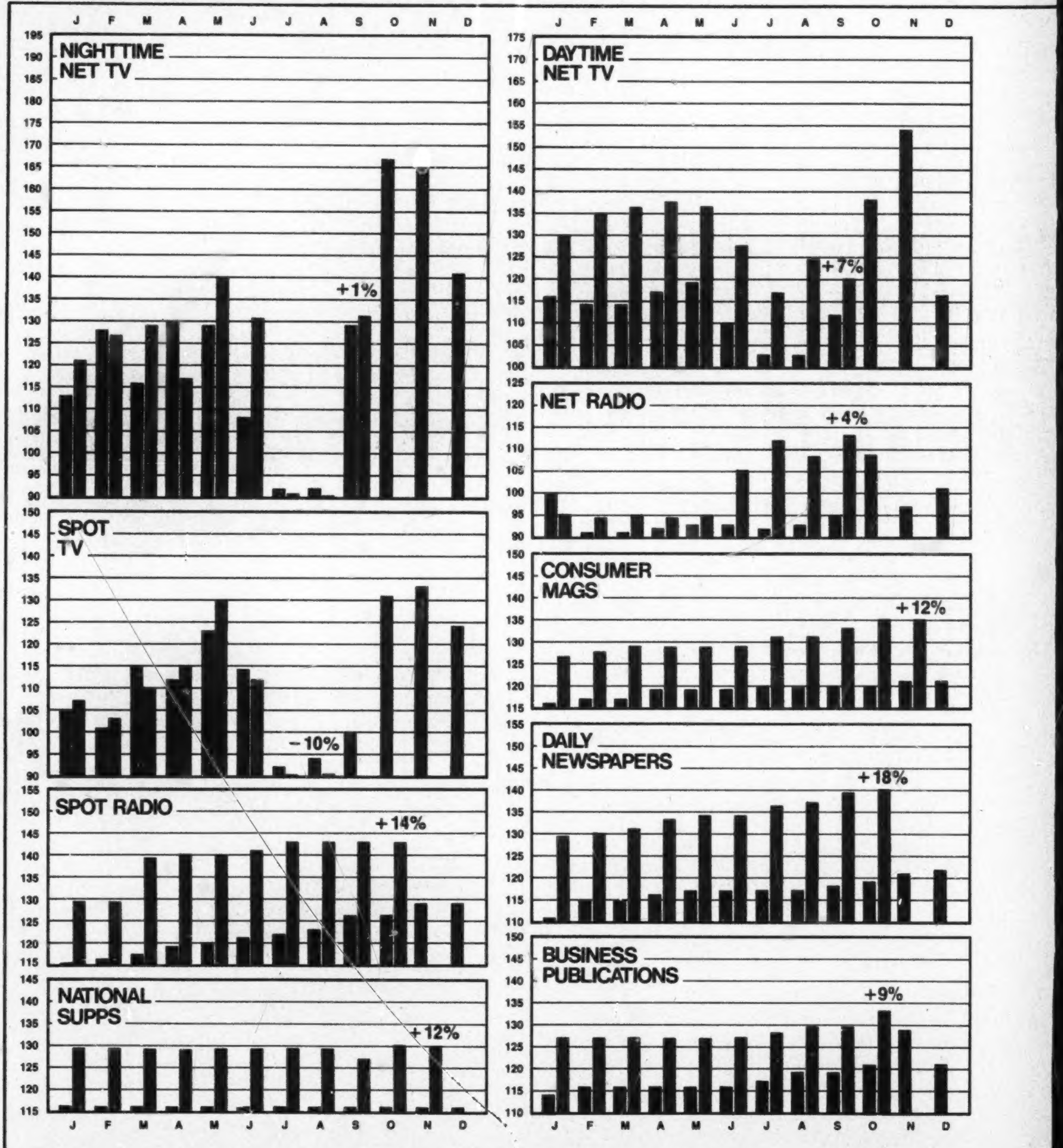
MEDIA COST INDEX

Black bars index for 1979; red bars 1980; base year 1977
Prepared by J. Walter Thompson Media Department



METHODOLOGY: The Media Cost index reflects industry reported trends extracted from available published sources. JWT Media Analysis utilized standard competitive report sources to develop comparable unit costs that reflected monthly cost trends by medium. Where industry competitive sources are unavailable, JWT sampled selected cost data from SRDS. Definition of the sources, universe, and media units used follows: *SOURCES*– **Nighttime Network TV**/BAR estimated commercial minute cost for *all* Night-time Network TV (6 PM to sign-off). **Daytime Network TV**/BAR estimated commercial minute costs for *all* Daytime Network TV (Sign-on to 6 PM). **Spot TV**/BAR CUME National Spot TV Report for estimated commercial minute costs for *all* national and regional Spot TV activity in 75 markets. **Network Radio**/BAR Network Radio Report used to estimate *all* three network (Excluding MBS) commercial minute cost. **Attention: Due to a change in BAR's source for commercial minute cost we are now using Jan. 1979 as a base for new index.** **Spot Radio**/JWT estimates based on reported SRDS cost of one minute on one station per market in the top 50 RADI markets. **Consumer Magazines**/JWT estimates based on reported SRDS cost of a P4/C for 30 national consumer magazines based on circulation. **National Supplements**

COST TRENDS
a Decisions analysis

Outdoor advertising cost estimates move back into our pages for the first time this year (see chart below). They were dropped because of unavailability of data. But now — thanks to the Buyers Guide to Outdoor Advertising, published by F. R. Cawl & Assoc. — we are able to furnish them along with the charts of cost trends for other major media.

The new estimates are based on costs of a Top 50 Showing in the top 50 markets. The base year for this index is 1977. Index 100 is the cost per panel in each month in the year 1977. Index 136 for June 1980 indicates, therefore, that costs in June 1980 were 36% higher than in June 1977, the base year.

Actual dollar figures are also made available by the Buyers Guide to Outdoor for a Top 50 Showing in top 50 markets. They indicate a rise from $558,877 in January 1977 to $862,949. Cost per panel required to achieve a Top 50 Showing rose during that time from $167.30 to $226.82 — plus 36%.

That's an increase of only about 12 percentage points a year — close to the rate of inflation. Poster plant operators' costs, like everyone else's, have been rising steadily during that time. But they have apparently done a good job of keeping their operating costs in line.

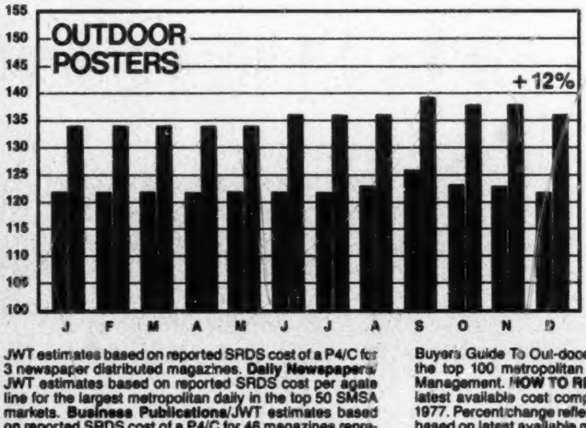
Rates and number of panels required in each market to make a Top 50 Showing are updated constantly in Cawl's reports. The Top 50 Showing is number of panels with various hours of lighting required to reach approximately 50% of the market.

Outdoor values have continued to hold up in spite of dire warnings as gas shortages and swollen gas prices have threatened to drive the drivers off the roads. It hasn't happened — and won't in the foreseeable future.

Even if mass transit and car pools are required in future years, Americans will still be mobile. They will be exposed to outdoor posters as they go to work, return to their homes, go shopping, travel to sports events, travel across country in vacation time.

New kinds of outdoor have arisen to make the medium more impactful than ever — back-lighted signs, rotated bulletins, cut-out sections and inflatable portions to add dimension. These new shapes and extensions are not represented as yet in the cost figures on this page.

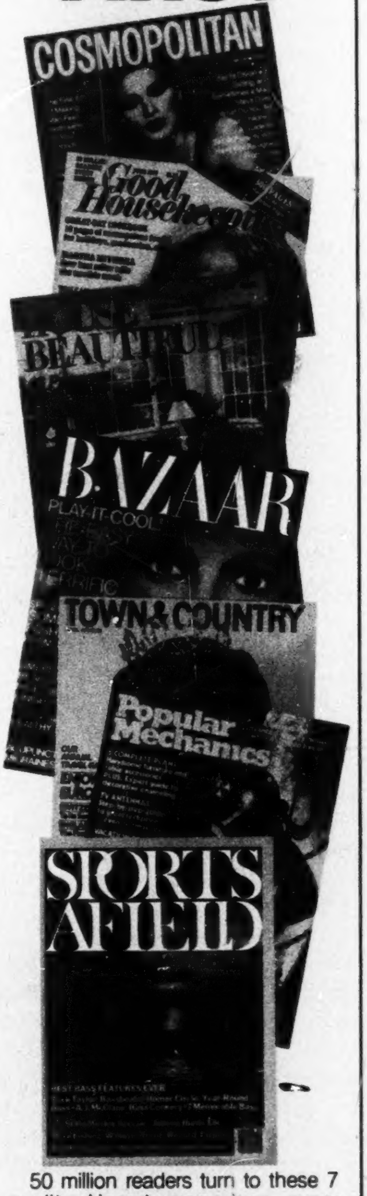
The index is based only on the most measurable portion of outdoor advertising — the 30-sheet poster panels.



Source: Buyers Guide to Outdoor Advertising, 1980-81. Costs of Top 50 Showing in top 50 markets.

JWT estimates based on reported SRDS cost of a P4/C for 3 newspaper distributed magazines. **Daily Newspapers/** JWT estimates based on reported SRDS cost per agate line for the largest metropolitan daily in the top 50 SMSA markets. **Business Publications/**JWT estimates based on reported SRDS cost of a P4/C for 46 magazines representing 42 business and professional classifications. **Posters/**IOAA reported rate card costs extracted from the

Buyers Guide To Out-door Avertising for a 50-showing in the top 100 metropolitan markets as defined by Sales Management. **HOW TO READ:** Media Cost Index reflects latest available cost compared to base of average year 1977. Percent change reflects annual rate of change and is based on latest available month compared to same month previous year.



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FUTURES

Postal sacks will bulge next year with direct mail

Continued growth for direct marketing business in 1981 is forecast by specialist Maxwell Sroge Co., Chicago. Early indications from 1980 point toward an extension of the mail order growth rate which exceeds that of traditional retailers from 50% to 100%.

The Sroge consulting group projects growth through 1990, reaching a point where one out of every two retail dollars spent will be in non-store purchases. According to Arnold Fishman, president of the consulting group, the main reasons for the expansion are:

TOP 10 MAIL ORDER PRODUCT CATEGORIES

	($000's)
1. Insurance	4,000,000
2. General Merchandising/Home Furnishings/Housewares/Gifts	2,700,000
3. Magazine Subscriptions	1,900,000
4. Books	1,388,000
5. Ready-To-Wear	1,340,000
6. Collectibles	920,000
7. Sporting Goods	780,000
8. Crafts	550,000
9. Foods	500,000
10. Records And Tapes	478,000

Source: 1980/1981 Maxwell Sroge Co. Mail Order Industry Annual Report

1) Dramatic increase in working women.

2) Equally dramatic growth in what he refers to as "totally-employed households" — those in which all adult members are employed.

3) Failure of traditional retailers to provide adequate service and product information.

Trend toward direct marketing, the report states, is exemplified by the decision of RCA, Armstrong Cork, CBS and Xerox to develop direct marketing.

Sroge predicts the catalog will become *the* store. Then it will gradually be replaced by cable tv plus video disc and video cassette presentations.

Jumping the band wagon for home electronics

Predicting the future of home electronics has become something of a fad, and few research organizations are able to resist the temptation to perform their own wizardry on the topic. Latest to join the prognosticating throng is Predicasts, Inc. Cleveland, with the following:

(1) "By 1995, the average household will be spending $2,000 annually on a variety of electronic products and services.

(2) "They will be combined into sophisticated systems used for communications, entertainment, education and environmental monitoring.

(3) "The national retail market by 1995 can be expected to run at about $200 billion. Communications services will be the biggest piece of that pie."

Predicast expects telecommunications to account for 75% of the revenues, but pay television is forecast to grow at a 21% rate annually to reach $40 billion by 1995.

Catv is expected to reach a 90% household penetration, and two-way interactive cable will reach nearly 70% of homes.

Videodisc penetration is projected to climb 53% annually, with seven million units in households valued at $1.5 billion by 1995.

Of the entire home electronics market, the computer device segment harbors some of the most interesting developments envisioned by Predicast analysts. Electronic games will represent an $800 million market, with another $1 billion projected for related software.

Implication for next 15 years: standard entertainment and current awareness media will gradually yield market share to many other services.

Toyota may be a small car, but it's a big sport

Whether or not Toyota is allowed to bring fewer cars into the U.S., it most certainly will put more footballs on the television screen in 1981.

Jim Press, national advertising manager for Toyota, says sponsorships will include NFL football games on CBS and college bowl games, along with four hockey teams, 31 baseball teams and 11 basketball teams, including the NBA champion Los Angeles Lakers. Toyota will continue its sponsorship of the Grand Prix auto races at Long Beach and Watkins Glen.

Press observes that "a survey of dealers shows they feel football is the number one sport to be associated with, so we went out and got it." Also added will be sponsorship of ABC's *Nightline News*.

Toyota will expand print in 1981 to include *Cosmopolitan* and *New*

SCHEDULING GUIDE TO AD READERSHIP STUDIES — PART 2

Ad readership will hold its own in 1981

This is part two of report by J. Wesley Rosberg, senior vp-Meldrum & Fewsmith, Inc., Cleveland, giving the who, where, when of 1981 ad readership. Part one was published in December *Decisions*; and there will be a follow-up of late listings in February. More issues of more publications than ever before are scheduled for this year. Added for the first time are issues of consumer magazines that will offer ad readership scores.

Publishers are apparently looking for a reasonably good year in 1981 — if their commitments to ad readership studies are any criterion. 1980 was a banner year for the number of publications that did studies and the number of individual studies completed, based on our tracking for over 25 years. Now, reports received to date indicate that at least as many publications will do an equal number of individual issue studies in 1981.

The accompanying table indicates the numbers of publications which did studies in 1980 and what our records show are now scheduled for 1981.

While these figures indicate an apparent drop off in terms of total studies in 1981, bear in mind that the 1980 figures are a reasonably accurate reflection of completions, where the 1981 figures are subject to change. Experience indicates that the changes are generally upward. For example, in our listings for *Wall Street Journal* and *Nation's Business* we show only the first half schedules. Historically these two publications do an equal number of studies in the second half. They, alone, could add 32 studies to our bottom line totals. Additionally, 37 publications which did 63 studies in 1980 have not yet been able to give us firm commitments for 1981. Some of these we hope to be able to report on in an addendum listing in February.

Each year we think that the number of individual services doing ad readership studies has reached the saturation point, but each year we end up with a new crop. These expansions reflect new companies coming into the business as well as the proliferations of services by existing companies, and the development of publishers' "in-house" studies.

In the various publication listings that appeared last month, and following in this article you will find references to five new services this year:

Ad Marks, an "in-house" mail study done by EW Communications on *Microwave Systems News*.

AdVantage, a commercial service performed by Health Industries Research which involves post-testing by means of a rotating portfolio of ads mailed to a cross section of the publication's target audience.

Nova, a service of Nova Research, a new company run by Alan Cobb, formerly with McGraw-Hill.

Laser Focus, an "in-house" service of Laser Focus Magazine.

Continued on page 104

Number of studies 1980 vs 1981

Publication class	1980 actual		1981 scheduled	
	Publications	Number of studies	Publications	Number of studies
Consumer publications	57	297	60	303
General business, management and news publications	18	274	17	239
Specialized business publications	302	1083	292	1086
Health care publications	44	155	44	139
Farm publications	26	31	26	37
Canadian publications	9	16	8	17
TOTALS	456	1856	447	1821

AD READERSHIP

(from page 76)

University Study, a special type of readership study developed by Harvest Publishing in conjunction with an unnamed university.

One service, Ad Point used by Medical Economics Publishing on its now defunct, *Current Prescribing*, has been dropped from the list as has Beta Research's "RAP" studies previously done for *Resident & Staff Physician* and *Surgical Rounds*.

With these adjustments we now have 46 different types of advertising readership studies being performed. Unfortunately space does not allow for us to describe each of these services. Shown below are some corrections on the listings which appeared in the December issue of *Decisions*. These are followed by new listings. Thanks to the good cooperation of Dr. Morgan Neu of Starch-Inra-Hooper we now have an almost complete rundown on schedules for consumer magazines.

CORRECTIONS TO DECEMBER LISTINGS

Specialized business publications

Chemical Engineering — Harvey: Change March 29 study to March 9
Decorating Retailer — Readex: Eliminate September study; Add November
Design News — Cahners: Add January 5 and 19
Farm & Power Equipment (correct service designation) — Readex, Red Sticker: October
Home & Auto — Readex, Red Sticker: May 1, August 1. (Dates previously omitted)
Plastics World — Cahners: Cancel June, Add July.
Poultry Tribune — Readex Red Sticker: May, has been cancelled.
Solar Quarterly — Readex Red Sticker: Correct date should be March 19.
Transport Topics — (correct service) Should read Ad-Q: Feb. 23, May 11, July 27, Oct. 19

Ad Readership Digest

A complete description of the 46 different readership services, along with a calendar of study dates by publications, and costs of reports, are included in the 1981 Edition of Meldrum and Fewsmith's Annual Advertising Readership Digest. Copies are available by sending check for $10.00 per copy to: Research Department, Meldrum and Fewsmith Inc., 1220 Huron Road, Cleveland, Ohio 44115.

Publication merger and name change

Effective January 1, 1981 *Water & Sewage Works* and *Water & Wastes Engineering* are being merged. Eliminate previous studies shown for *Water & Wastes Engineering*. Correct listing for the merged publication will be: *Water Engineering & Management* — Fosdick: January, April, July, October

Consumer magazines

Ebony — Starch: Add December
Glamour — Starch: Eliminate February
Seventeen — Starch: Eliminate January, add February

General business, management and news publications

Fortune — Add Starch: Feb. 9, March 9, April 6, May 4, June 15, Sept. 21, Oct. 18, Nov. 16. (Previous listings of Harvey Adverbatims dates still apply)
Newsweek (New York Metro Edition) — Starch: Correct date from May 13 to May 11.

Farm publication

California Farmer — Readex Red Sticker: March 21 has been cancelled.
Progressive Farmer — Readex Red Sticker: delete March; add mid-April (Mid-west soybean edition).

Health care publication

Diagnostic Medicine — MI-Q: Correct dates are May/June, November/December

ADDITIONAL 1981 LISTINGS

Specialized business publications

American Shipper — Ballot: April
Aviation Week & Space Technology — Harvey: Feb. 9, May 18, July 13, Aug. 17, Sept. 28
Beverage World — Ad-Q: January, July, October
Broadcast Communications — Adv. Performance: February, December
Builder — Ballot: March, July, September
Butane-Propane News — Ad-Q: January
Datamation — Ad-Q: February, March, May, July, October, November
Drilling — DCW — Readex: March
Electronic Products Magazine — Starch: February, August
In-Plant Reproductions — Ad-Q: March
Interior — Ad Sell: March
Lawn and Garden Marketing — Ad-Q: October
Microwave Systems News — Ad Marks: February, April, July, October, December
Office Products News — Starch: June, October
Office World News — Starch: March 1, July 15
Package Printing — Ad-Q: February
Pest Control — Readex: February, September
Plastics Compounding — Hagen-ARS: Jan/Feb.
Plastics Design Forum — Hagen-ARS: Jan/Feb.
Power — Ad Feedback: May, October
Printing Impressions — Ad-Q: February
Processed Prepared Food — Harvey: March, November
Production — Harvey: January, April, July, October
Production's Manufacturing Planbook — Harvey: Mid-April
Railway Age — Simmons: Jan. 26, May 25, Sept. 14
Railway Track & Structures — Simmons: March
Restaurant Business — Ad Sell: February, June, October
Science — Ballot: April 17, July 17, Oct. 9, Dec. 11
Telecommunications — Readex: July, December
Weeds, Trees & Turf — Readex: March, August
Wire Technology — Fosdick: July/August

General business, management and news publications

Business Week — Starch: Jan. 12, 19, 26, Feb. 2, 9, 16, 23, March 2, 9, 16, 23, 30, April 6, 13, 20, 27, May 4, 11, 18, 25, June 1, 8, 15, 22, 29, July 6, 13, 20, 27, August 3, 10, 17, 24, 31, Sept. 7, 14, 21, 28,

October 5, 12, 19, 26, Nov. 2, 9, 16, 23, 30, Dec. 7, 14, 21, 28
Business Week (Industrial Edition) — Starch: Jan. 12, 19, 26, Feb. 9, 16, 23, March 9, 16, 23, April 6, 13, 20, May 4, 11, 18, June 1, 8, 15, 29, July 6, 13, 27, August 3, 10, 24, 31, Sept. 7, 21, 28, Oct. 5, 19, 26, Nov. 2, 16, 23, 30, Dec. 14, 21, 28
Forbes — Starch: Jan. 5, Feb. 16, March 16, April 13, 27, May 11, Sept. 14, 28, Oct. 12, 26, Nov. 9, 23
Nation's Business — Harvey: February, April, June, 2nd half TBA
Output — Harvey: January, February, June, August, October, December
Scientific American — Starch: January, September
Sports Illustrated — Starch: Jan. 12, Feb. 2, April 6, 20, May 11, June 1, 29, July 13, Aug. 31, Sept. 7, 14, Oct. 12, 19, 26, Dec. 7, 28
Time — Starch: April 13, May 11, Nov. 9, Dec. 7
U.S. News & World Report — Starch: Feb. 23, March 30, April 20, June 8, Sept. 14, Oct. 12, Nov. 16 (National edition)
U.S. News & World Report (Blue Chip Demo.) — Starch: Mar. 30, June 8, Oct. 12
U.S. News & World Report (Million Market Edition) — Starch: April 20, November 16
Wall Street Journal — Starch: Jan. 7, 12, 20, 23, 27, Feb. 3, 6, 10, 19, 24, March 4, 10, 16, 19, 24, April 2, 8, 14, 21, 29, May 5, 11, 15, 20, 26, June 2, 9, 17, 23, 2nd half dates TBA

Consumer publications

Better Homes & Gardens Kitchen & Bath Ideas — Starch: Spring, Winter
Better Homes & Gardens Kitchen & Family Room Ideas — Starch: 1981 edition
Better Homes & Gardens Remodeling Ideas . — Starch: Spring, Fall
Book Digest — Starch: March, October, December
Boston Magazine — Starch: October, November
Co-Ed — Starch: April, September
Cosmopolitan — Starch: March, April, May, June, September, October, November, December
Essence — Starch: February, October
Family Circle — Starch: TBA
Family Weekly — Starch: TBA
Field & Stream — Starch: April, October
Golf Digest — Starch: February, May
Good Housekeeping — Starch: February, March, April, May, June, July, September, October, November, December
Hot Rod Magazine — Starch: April, May
House & Garden — Starch: February, March, April, May, September, October, November
House & Garden Building & Remodeling Guide — Starch: March/April, September/October
House Beautiful — Starch: March, April, May, September, October, November
Mademoiselle — Starch: August
McCall's Magazine — Starch: March, April, May, October, November, December
Mechanix Illustrated — Starch: April, May, November
Motor Boating & Sailing — Starch: January
National Geographic Magazine — Starch: April, May, September, October, November
New York Times Magazine National Economic Survey — Starch: Jan. 11
New York Times Fashions of the Times — Starch: Mar. 1
New York Times Magazine Men's Wear Section — Starch: Mar. 29
New York Times Sunday Travel Section — Starch: Mar. 15, 29, Apr. 12, May 3, June 14, Oct. 18, Nov. 22
Parade — Starch: Jan. 4, 18, Feb. 1, 15, March 1, 15, 29, April 12, 26, May 10, 24, June 7, 21, July 5, 19, Aug. 2, 16, 30, Sept. 13, 27, Oct. 11, 25, Nov. 8, 22, Dec. 6, 20
Philadelphia Magazine — Starch: TBA
Playboy — Starch: January, March, April, May, June, September, October, November, December
Popular Mechanics — Starch: March, April, May, September
Redbook Magazine — Starch: March, October
Senior Scholastic — Starch: Sept. 21
Stereo Review — Starch: February, April
Sunset — Starch: February, March, April, May, June, September, October, November, December
Tennis — Starch: June
Vogue — Starch: April, November
Yachting — Starch: January

Farm publications

Farm Industry — Ballot: February
Farm Journal (Illinois, Indiana and Iowa editions only) — In-House Study: Mid-January, March, June/July, August, October, December

Canadian publications

Heavy Construction News — Starch: Feb. 16
Maintenance Engineering/Management — Ad-Q: April, October

Health Care Publications

AANA Journal — Inter-Ad: April
AAR Times — Inter-Ad: March
Clinical Chemistry News — Ballot: February, September
Clinical Chemistry — Ballot: March, May
Consultant — Space: January, April, July, October
Drug Topics — ReADsponse: March 6, June 5, Sept. 4, Nov. 6
Medical Economics — ACT: April, August, December
Medical World News — Ad-Vise: Jan. 5, March 2, May 11, July 6, Sept. 1, Dec. 1
Ophthalmic Surgery — Inter-Ad: February, September
Orthopedics — Inter-Ad: February, June, September
Postgraduate Medicine — Adv. Performance: February, May, August, November
RN Magazine — RN AD Evaluation Studies: March, July, October
Respiratory Care — Inter-Ad: August
Southern Medical Journal — Inter-Ad: February, June
U.S. Pharmacist — AdVantage: January, May, August, November

NEWSMAKERS (from 28)

Rondo Beverage Corp., a wholly-owned subsidiary of Schweppes U.S.A. Ltd., appoints **Keith Marshall Jones III** vp/marketing. Jones leaves Anheuser-Busch, where he was marketing manager for new beverage products. At Rondo, Jones will oversee marketing, advertising and promotion for the company's lightly carbonated citrus-flavored soft drink.

Joan Hamilton becomes senior planner at Ayer Jorgensen MacDonald, a Los Angeles-based division of N W Ayer ABH International. Hamilton, who moves over from Webb & Silberg/L.A. where she was media director, will supervise planning on Beckman Instruments, First National Bank of Nevada, Yamaha and Transamerica.

Chateau & Estate Wines Co., a House of Seagram company that imports French, German and Italian wines as well as Sandeman ports and sherries, names **John W. Laird** vp/marketing. The new position is a promotion from Laird's previous position.

Edwin F. McDonald Jr. leaves Albert Frank/FCB to become vp/director of direct response division of Doremus & Co.

Howard H. Marsh advances from vp/senior associate of Vitt Media International to group vp, management representative and executive director of the firm's broadcast buying unit. He is a former president of Atwood Richards Inc., a media buying and barter company.

United States Gypsum Co. names **Donald F. Sittnick** product manager for its chemicals division. Sittnick has been at US Gypsum since 1977, serving as manager for administration and budget control.

E. Dale Price joins the media department at D'Arcy-MacManus & Masius/St. Louis, as a senior buyer for the Mercantile Bancorporation account. She is a former media buyer for Stix, Baer & Fuller.

From an Owens-Illinois glass container division ad

Brand report 61:

Soft drinks

Coming off two peak spending years, soft drink marketers could look forward to little respite from clamorous competition that has characterized the industry in recent years. Television continues to be the key medium, but network radio and magazines are attracting attention for those seeking ways to segment their markets.

The soda pop war is escalating.

What was once the domain of the two soft drink super powers is now the battle ground for at least four major U.S. corporations, with a fifth getting ready for a substantial onslaught.

Coca Cola, USA, and Pepsico had long dominated the soft drink market. But more than a minor skirmish was brewing when Philip Morris, owner of Miller Beer, added Seven-Up to its stake in the beverage business in 1977.

The rumble of the marketing militia became more evident this summer when Procter & Gamble outbid Dr Pepper for the purchase of Crush International. And the power of Anheuser-Busch was becoming evident this year despite a false start with Chelsea, as A-B developed momentum for its new root beer, Root 66.

Other factors that will affect the soft drink market in the near future are ITT's C&C Cola, which is moving na-

Leading soft drink media spenders in 1979

Brand	Total	Magazines	Network tv	Spot tv	Spot radio	Outdoor	Newspapers
Schweppes	$ 5,279,400	—	$ 472,300	$ 4,499,100	$ 2,500	$ 180,500	$ 125,000
Coca Cola	46,169,200	$1,037,800	19,072,500	19,263,800	3,598,800	2,532,700	663,600
Sprite	10,097,400	149,200	3,656,000	5,757,400	245,300	160,000	128,500
Dr Pepper	11,363,900	—	3,679,500	5,474,400	1,315,200	470,300	425,200
Sunkist	8,035,000	—	—	7,946,600	4,100	18,700	65,600
Canada Dry	6,709,800	1,057,500	2,030,800	2,618,600	279,000	73,100	651,000
Mountain Dew	9,295,700	—	1,705,200	6,623,500	885,000	46,500	35,500
Pepsi Cola	39,358,700	214,800	13,025,300	23,026,100	2,328,300	444,200	420,000
Seven-Up	28,336,600	432,800	19,118,400	3,330,100	1,176,300	1,873,100	2,405,900
Royal Crown	7,569,000	38,100	1,721,500	5,548,900	141,600	23,600	44,300
A&W	4,094,000	80,200	609,600	2,491,400	700,300	1,500	205,000

Source: Leading National Advertisers, Radio Expenditure Reports, Media Records.

tional from a well planned regional base, and King Cola, which now has 20 of its 24 projected "kingdoms" assigned to franchisees. Not to be overlooked are the swiftly established Sunkist, and the move east of A&W.

That's a lot of activity for a market that is growing at about 4% a year.

But even more astonishing is the yearly growth rate for media expenditures, which has been running at about 30% since 1977. Last year, the six media total measured by Leading National Advertisers reached $188,746,800. With spot radio and newspapers added in, the figure soars above $200 million. First half expenditures for 1980 suggest a total in excess of $230 million in measured media, with the growth rate down to a "mere" 12%.

In addition to increased competition, soft drink bottlers face problems in the rising cost of sugar, cans and bottles, and distribution.

Martin Romm, vp. of the brokerage house Donaldson, Lufkin and Jenrette, recently told a meeting of New Jersey bottlers that "by necessity, bottlers will have to find ways to distribute their products more efficiently." He recommended advance sales and the possible elimination of some marginal accounts.

On the bright side of the ledger, the threat of an FTC move to dismantle the existing franchise system was removed last year. The soft drink franchise bill was passed by both House and Senate by sizeable majorities and signed into law by the President. The action made moot an FTC challenge to the system's legality.

In 1980, the major battle in soft drinks raged between Coke and Pepsi, as Coke indulged in a wild streak of price cutting in an effort to undermine Pepsi's strength in supermarket and retail carry-out sales. This strategy apparently worked, as Coca-Cola was able to reduce Pepsi's Nielson share lead from 2 points to 1/10 of a point by late fall.

Pepsi Cola's management has gone on record as saying it won't respond to price cuts to meet the Coke threat, but if Pepsi's supermarket lead continues to erode, it may have to resort to similar tactics. Meanwhile, Pepsi will continue its effort to win more vending machine and fountain business, where Coke, remains the unchallenged leader.

The factor of flavor is also expected to play a strong role in 1981, as soft drink companies push efforts to be fully represented in all popular flavor categories.

The overall prognosis for the carbonated soft drink market is continued heavy media expenditures, particularly by Coke and Pepsi, and anyone who wants to compete with them. Even for regional brands, the media cost of staying in business will constantly expand.

Here's how the various marketing battle strategies are shaping up.

Coca Cola

Top notch creative and the top spending laurels still characterize the Coca-Cola marketing stance in its advertising. The Coke creative position puts the product first, and keeps it there. Coke gained considerable attention last year with its Mean Joe Greene commercial, in which an admiring kid offers the Pittsburgh Steeler defender his Coke after Mean Joe has had a tough game.

In media spending, Coke nearly doubled its outlay in a three year period, jumping from $24,914,200 in 1977 to $46,169,200 in 1979. Television accounted for 90% of the '79 total, with $19 million each going into network and spot television. Spot radio got $2.6 million, and outdoor $2.5 million.

Coke's spending in the first half of 1980 ran about 10% ahead of 1979, most of which went into network television. Coke also used magazines in the first half, which hadn't been utilized the year before.

Albert E. Davis, media coordinator for Coca-Cola USA, explained that the apparent increase in network tv in the first half of the year was due to time purchased in the winter Olympics. Otherwise, the mix didn't vary from the previous year.

In 1981, the only change from the established media pattern will be the use of network radio, for the first time. The buy includes time on NBC's Source, its youth network package, and a special network package created by ABC. The keystone of Coke's use of network radio in 1981 will be the sole sponsorship of 20 rock concerts, which will push all the major brands, Coke, Tab, Sprite and Mello Yello.

Davis said that no major changes are contemplated in the television creative campaign for Coke.

Pepsi Cola

1980 was a big year for Pepsi Cola. It rolled out a new campaign, tagged *Catch that Pepsi Spirit*, created by BBDO, and outspent Coca-Cola in the first half of the year.

There was good reason for Pepsi to be expanisve in its marketing and advertising. It had surpassed Coke in supermarket and takeout sales and was riding high.

Where Coke was holding the line in media spending in a recessionary year, Pepsi decided to go all out. Alan Pottasch, senior vp, creative services commented on the wisdom of doing just that: "Trying to save money on advertising in a recession is like trying to stop your watch in order to save time," he said.

Pottasch also had some things to say about the differences between Coke and Pepsi advertising. "The difference is that we depict a more believable person. You won't see a person pushing the product toward the camera, as was done in the most recent Seven-Up commercials. In my view, that was just not believable. The same is true of Coke, *Have a Coke and a smile*. Coke is the hero of the piece, not the user."

Of the recent *Catch the Pepsi Spirit* commercials, he said. "I think people remember better, associate better, and want to be a part of that scene. Our focus groups replay that feeling."

Pepsi Cola announced a $40 million campaign for 1980, of which close to $30 million went into network televison. That was a stark change from previous years, in which Pepsi spent the bulk of its television dollars in spot markets. The ratio in 1979 had been $23 million in spot, and $13 million in network.

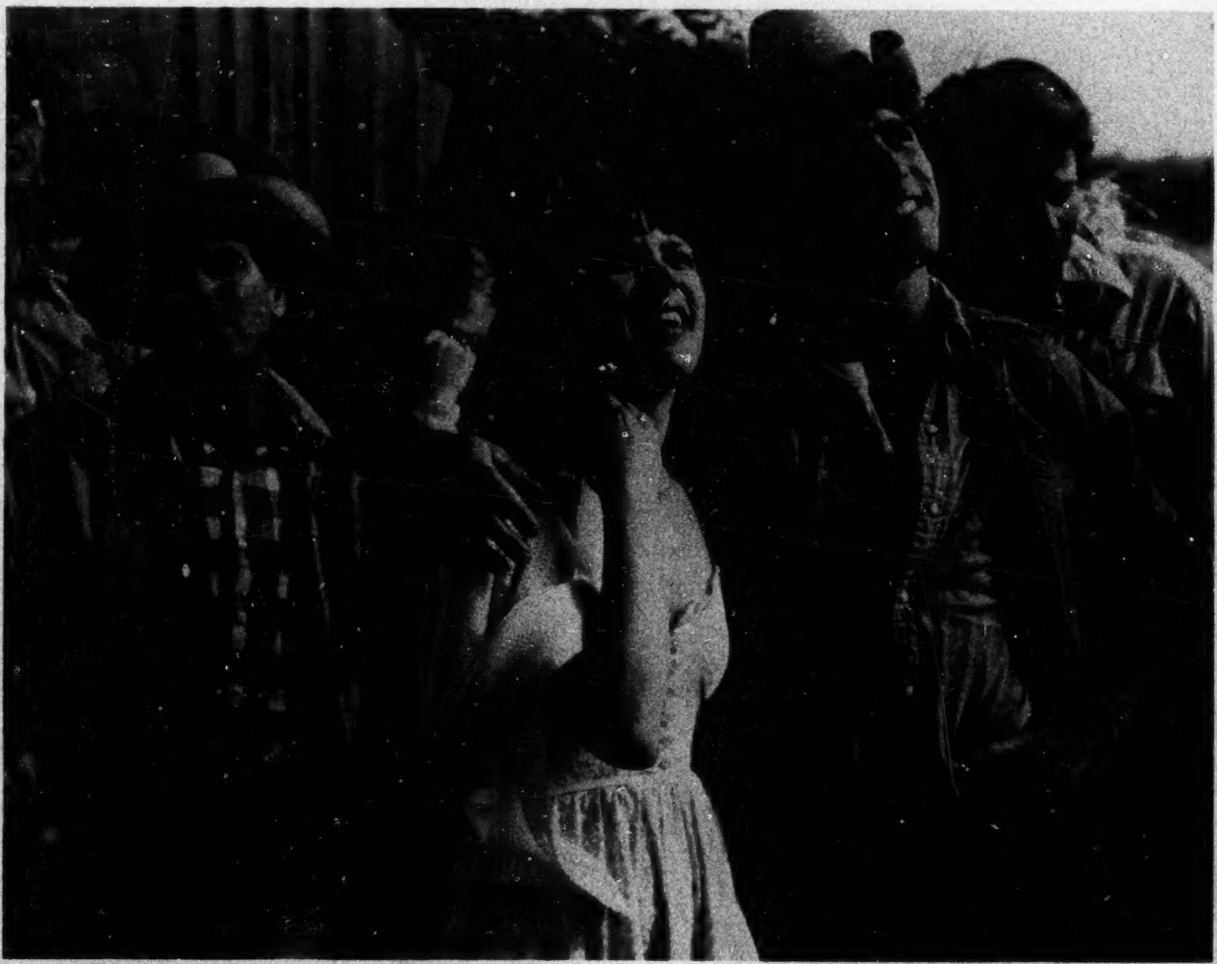
Pepsi also adapted its *Spirit* campaign for spot radio, which played a role in Pepsi's effort to strongly challenge Coke's supremacy in vending and food service channels.

Pepsi is continuing to use its Pepsi Challenge taste test theme in selected markets. It most recently surfaced in Texas.

Pepsi's Henry Hayes declines to discuss plans for 1981, but Pepsi probably will continue to spend at heavy levels to hold its supermarket lead, and take what business it can from Coke in the vending machine and food service business.

Seven-Up

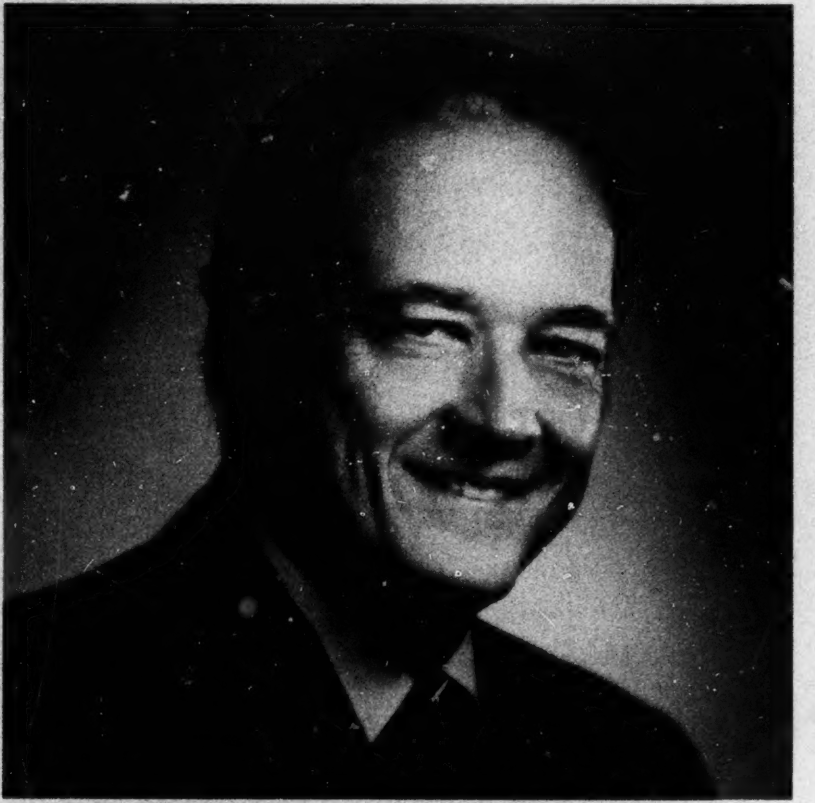
Even after its acquisition by Philip Morris, Seven-Up has been hard



Pepsi Cola's "Catch that Pepsi spirit" campaign on television used vignette dramas to capture attention, as in this scene from the "Skywriter" commercial.

pressed to hold its number three position among the industry leaders. Dr Pepper execs say they took third place in 1980 but don't have the hard statistics to back the claim.

Meanwhile, Seven-Up continues with the campaign created by its new agency, N W Ayer with the theme, *America's turning Seven Up*. New commercials have been added to the series — and in radio, some sports celebrity sportspersons. But the theme remains unchanged.



"Spot radio became our first local medium in 1980. We built our plan around it." Ralph Countryman, Seven-Up.

Seven-Up's expenditures appeared to have declined in 1980, with the first half in LNA measured media down from $15,695,500 in 1979 to $12,600,400 in the first half of last year. Magazines, were cut from the schedule completely, and spot television, which was down about $600,000.

Industry observers suggest that the future growth of Seven-Up depends on its ability to become a full flavor soft drink operation. A high ranking Seven-Up executive recently stated at an east coast convention that "a soft drink company without a cola flavor is like a car with three wheels."

The question is whether Seven-Up will make a move in the direction of cola in 1981. It is over a year since the company purchased Dixie Cola, a small regional brand, but has as yet done little to exploit the expansion possibilities made possible by that acquisition.

Another indication of seriousness at Seven-Up was the restructuring of the marketing and media team at the company last year. Among those brought in to add muscle to the operation was Ralph Countryman, who had been media operations coordinator at Coca-Cola USA. He explained Seven-Up's media strategy:

"We used a substantial amount of radio this year. Spot radio became our first local medium. We built our plan around it. We bought spot radio in our local markets before we bought spot tv. Then we went step by step, as the budget allowed, to add another media.

While we do consider network television from the point of view of the best possible efficiencies, what we do is to put together the best media mix we can in each market," Countryman said.

It would appear that Seven-Up's 1980 budget was down slightly from 1979 levels, which probably accounts for the departure of magazines from the media mix, although they were used for Diet Seven-Up.

Countryman declined to comment on 1981 plans, but they will probably include a slightly larger budget, and a pattern in broadcast similar to 1980's. If some new flavor products are up for introduction in 1981, it could mean a diversion of funds from the parent brand to support the cost of test market operations.

Dr Pepper

The growth darling of the industry has apparently come of age. Since the mid 1970's, Dr Pepper had expanded its sales at a rate twice that of the rest of the industry. But as the 1980's began, Dr Pepper's growth surge levelled off. Sales were keeping pace with the industry.

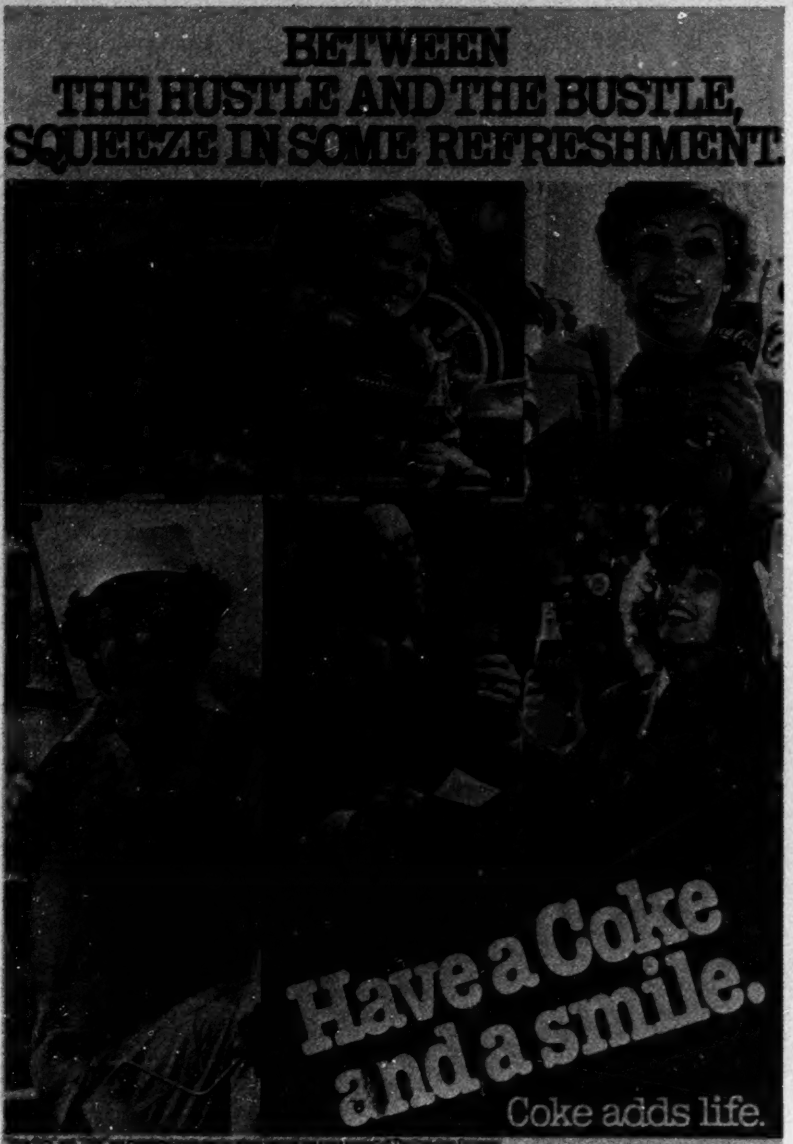
Apparently Dr Pepper was spending more in media to sustain its growth rate. Spending for the first half of 1980 totalled $6,563,600, as compared with $4,896,800 in the same period the year before. That jump in spending in LNA measured media was focused in television, where Dr Pepper expanded its presence.

Creative for the beverage has departed from the stunningly different campaigns of the growth period to the more sedate *Be a Pepper*, which verges from product identification into some aspects of a youthful lifestyle.

The key question facing the company in 1981 is where it will place its marketing emphasis: in seeking greater domestic sales, or a move to develop overseas markets. In past years, Dr Pepper management has believed that it could expand business indefinitely in the domestic market. But to regain the momentum of the years prior to 1980 will require a higher level of media activity and a more pungent creative campaign that was evident in 1980.

Canada Dry

Perhaps it was the mineral water explosion that stirred Canada Dry to new activity in its markets. Possibly it was the aggressive posture taken by Schweppes in recent years. But whatever it was, Canada Dry got busy.


BETWEEN
THE HUSTLE AND THE BUSTLE,
SQUEEZE IN SOME REFRESHMENT.
Have a Coke
and a smile.
Coke adds life.

Coke uses black and white full page ads in beverage trade publications stressing the theme of its consumer ad campaign.

First half spending more than doubled over the previous year, and Canada Dry made its presence felt in network television in that period, which it hadn't done in the year before.

With a multiplicity of flavors, Canada Dry advertising is broadly spread, but in 1980, it was soda water that got the lion's share of attention. French actor and bon vivant Louis Jourdan became the spokesman for club soda, touting it as sparkling and refreshing.

Canada Dry also managed a good defense when it challenged a series of full page ads from Poland Springs, that made odious comparisons between the water from Maine and club soda. Poland Springs withdrew the ads.

After several years of dormancy, Canada Dry may be ready to develop the potential for its broad flavor line. Network television spots have focused on the flavor line and establishing brand registration. However, creative has made little effort to meet the competition on its home ground, developing associations with active and youthful lifestyles.

Considerable financial infusions would be necessary to transform the image of Canada Dry in both the creative and media strategy areas of performance.

Crush International

Many eyebrows were raised last summer when Procter & Gamble bought Crush International after strenuous acquisition competition from Dr Pepper. It put P&G into yet another segment of the packaged good business.

In years past, Crush has been a marginal contender with its three Crush flavors: orange, grape and strawberry; Hires Root beer; and citrus brand, Sundrop. It is P&G's averred intention to "build the business of the current Crush brands."

Since the acquisition, P&G made only one major personnel change at Crush, with the appointment of Richard S. Gurin as general manager. Previously, Gurin had been national sales manager for the food products division.

P&G certainly has room to build national distribution for Crush and Hires. Crush is distributed 72% of the country, and Hires in 60%. Sundrop has its broadest distribution in the South.

One of the first actions at P&G was to change agencies, dropping Lee King & Partners for Cunningham & Walsh, in New York. Stronger creative should be at least one of the results of that switch.

A heavier media presence may also be expected from Crush, once its new creative comes on line. Expenditures in previous years have been under $3 million. Last year, Crush spent $1,569,000 in LNA measured media. Spot tv took $1,217,200, network only $148,000.

Most likely, P&G will put its primary efforts into expanding distribution into a more truly national system to get the efficiencies of network television, which has been the mainstay of P&G's overall media strategy for the past two decades.

Anheuser-Busch

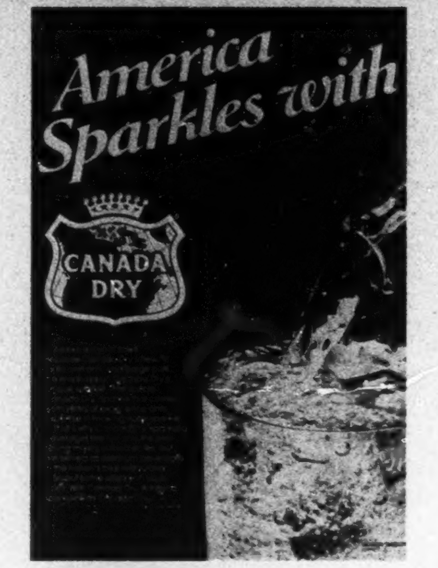
Can the undisputed leader of the beer industry in the U.S. successfully introduce and market a soft drink? That's the question Anheuser-Busch is trying to answer in the affirmative.

A-B's first shot at the market was Chelsea, a citrus flavor that contained a smidgeon of alcohol. While the beverage was still in test market, enough objections to an alcoholic "soft drink" were raised to embarrass A-B into withdrawing the product.

Undaunted, A-B soothed its ruffled feathers and tried again, this time with a root beer.

Root 66 went into test market last summer. The report from A-B is that the product "performed reasonably well," and gave senior management enough encouragement to expand the number of test markets in 1981. Last year's markets included Sacramento and Peoria.

Test market media activity was limited to spot television, newspapers, and spot radio. More money is indicated this year, but a roll-out for the product is likely to be gradual and preceded by cautious evaluation.



Canada Dry made a heavy commitment to magazines in 1980, using trade ads as well as a consumer publication list.

1981 probably isn't the year for a Root 66 rollout, but if all goes well, the following year will probably be the time for national marketing and media plans. Even so, it won't be easy for Root 66 to buck the rootbeer experience of A&W, and Canada Dry's efforts in behalf of Barrelhead, not to mention whatever P&G decides to do with Crush's Hires brands.

Schweppes

While Canada Dry wasn't looking, Schweppes began creeping up with a growing media presence. In 1979, Schweppes put close to $6 million behind its two brands, the tonic water and the citrus flavored Rondo. Multi-product advertising was the favored method for creative.

Spot television was the primary medium, taking $4.5 million of the total, while network tv weighed in at $472,300. Small amounts of outdoor were also applied.

The distribution pattern has thus far kept Schweppes out of the efficiencies of national media. However, John Onthank, president of Schweppes U.S.A. Ltd., commented that "for all practical intents and purposes, we are national."

Media selection for 1981, he said, will be focused in network and spot television, spot radio, and in markets where its use is favorable, outdoor.

While declining to give a percentage breakout of media use, he said that the pattern probably won't diverge much.

Royal Crown

Once one of the major names in the soft drink market, Royal Crown has lost ground over the years. The company has been in the difficult position of trying to match the life style commercial efforts of its heavy spending competitors with about 20% of their available funds.

RC changed agencies last year, moving out of Ogilvy & Mather in Chicago over to The Don Tennant Co. And as in the past, the new campaign attempted to develop a distinctive positioning for the brand. The question is how many people identify with hang gliding?

The media budget was down by almost a third in the first half of 1980, from $3,870,700 to $2,766,200. That move eliminated the use of network tv in the first half of the year but kept the use of spot tv at the same level as the year before, minus the deductible of inflation. RC did get into network tv in a small way in the third quarter.

While RC does manage to stretch its advertising dollars a long way in terms of creative and media, but the competition is becoming increasingly formidable as RC's resources are apparently shrinking. Most industry observers put its best hopes for success on RC 100 brand.

Conclusions

Media budgets will probably continue to rise at a rate equal to or greater than inflation in 1981, as competition remains keen between the top established brands, and the challengers continue to expand their efforts to win a greater market share.

C&C Cola will continue to open new markets and expand its commitment to spot television and newspapers. King Cola, with its franchises mostly taken, may actually get the national media plan it has promised underway this year.

Sunkist, although it was spending less last year than in its introductory year in 1979, may be close enough to national distribution, and feel enough pressure from the Orange Crush threat, to mount a sizeable national media campaign.

While most eyes will continue to watch the Coke, Pepsi and Seven-Up battle, the marketing skirmishes developing on the lower tiers of the carbonated soft drink business promise plenty of activity.

— Fred Gardner

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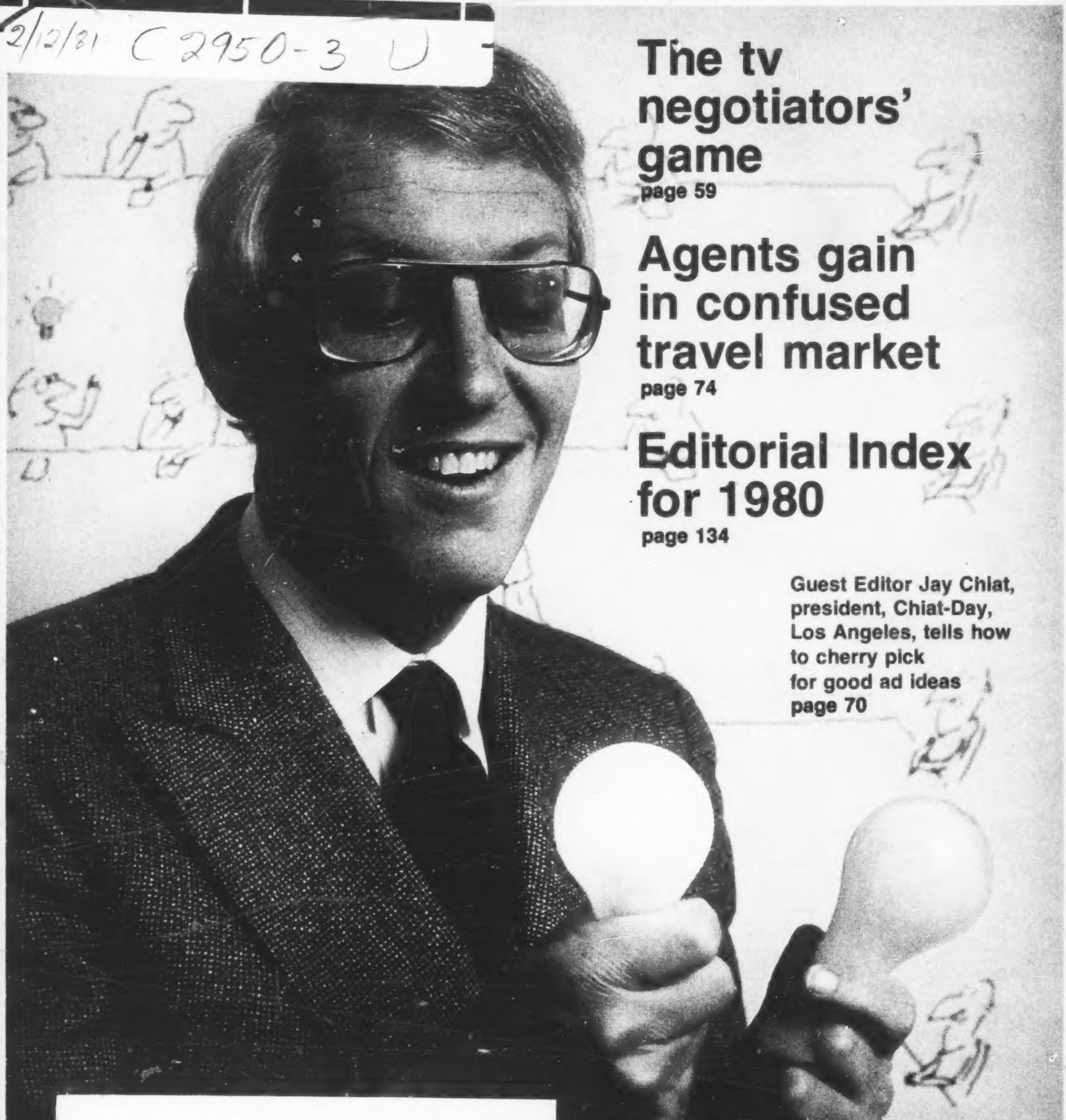

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CDIM0041189-NS-281K
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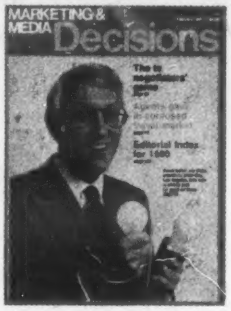

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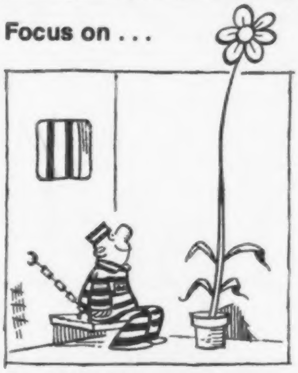

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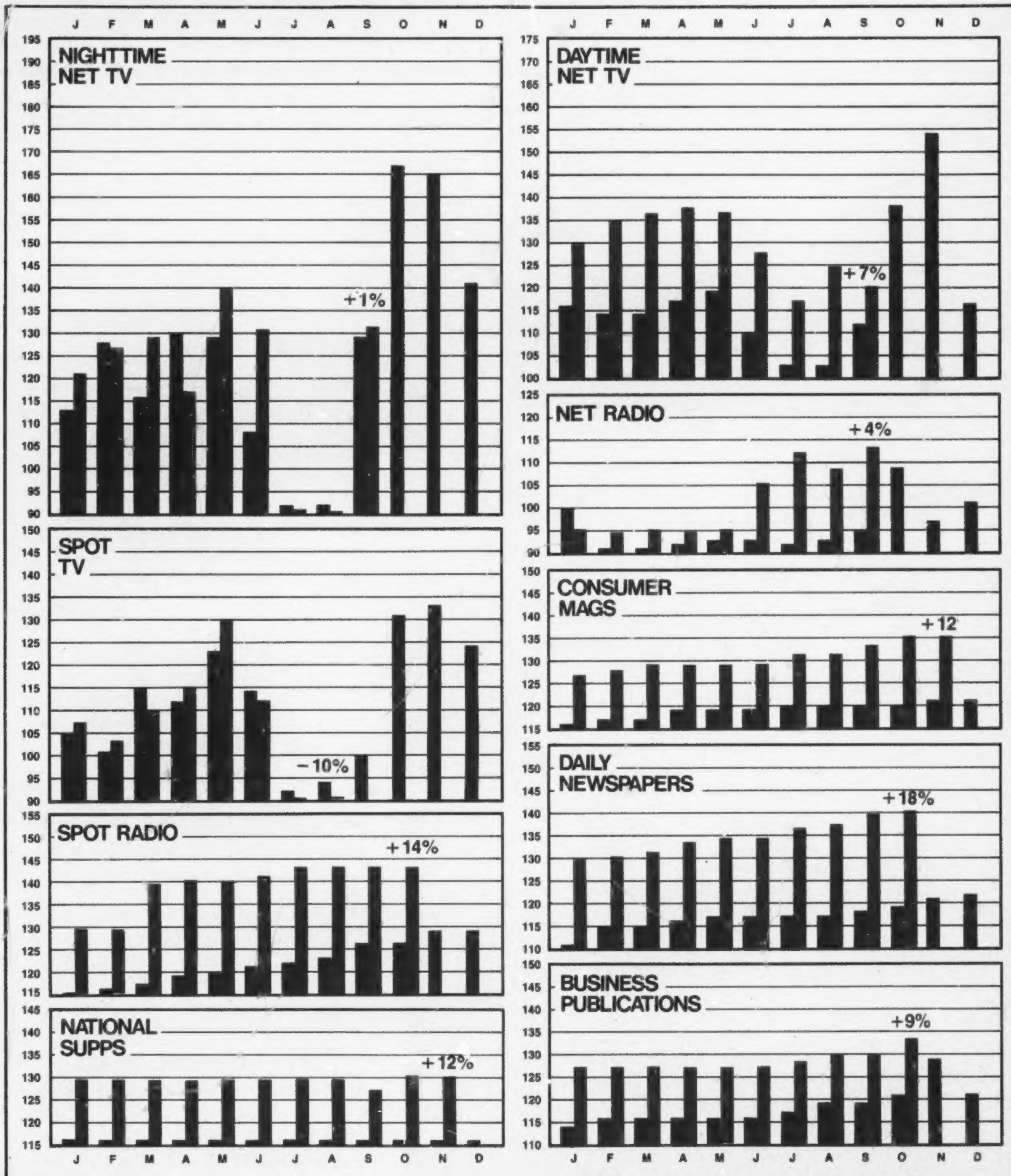
MEDIA COST INDEX

Black bars index for 1979; red bars 1980; base year 1977
Prepared by J. Walter Thompson Media Department



METHODOLOGY: The Media Cost index reflects industry reported trends extracted from available published sources. JWT Media Analysis utilized standard competitive report sources to develop comparable unit costs that reflected monthly cost trends by medium. Where industry competitive sources are unavailable, JWT sampled selected cost data from SRDS. Definition of the sources, universe, and media units used follows: *SOURCES*– **Nighttime Network TV**/BAR estimated commercial minute cost for *all* Night-time Network TV (6 PM to sign-off). **Daytime Network TV**/BAR estimated commercial minute costs for *all* Daytime Network TV (Sign-on to 6 PM). **Spot TV**/BAR CUME National Spot TV Report for estimated commercial minute costs for *all* national and regional Spot TV activity in 75 markets. **Network Radio**/BAR Network Radio Report used to estimate *all* three network (Excluding MBS) commercial minute cost. **Attention: Due to a change in BAR's source for commercial minute cost we are now using Jan. 1979 as a base for new index.** **Spot Radio**/JWT estimates based on reported SRDS cost of one minute on one station per market in the top 50 RADI markets. **Consumer Magazines**/JWT estimates based on reported SRDS cost of a P4/C for 30 national consumer magazines based on circulation. **National Supplements**

COST TRENDS
a Decisions analysis

Business publication prices, as shown in the chart on the opposite page, are only running 9% over the year previous. This in a year when inflation in general has run 14%. The publishers are doing a good job of keeping their costs in line, holding rates down.

Actual costs of business publishers are running over 9% in all four of the vitally important areas: paper, printing, distribution (including postage) and people.

Charles Mill, president of American Business Press, reports that in 1980 those costs were up about 15% overall ——and in detail as follows:

Paper	+14-15%
Printing	+10%
Distribution	+10%
People	+16%

This year he expects the cost of business paper publishing to move up again by about 10-12% overall, led by whopping increases. Here's the ABP break-out for 1981:

Paper	+10-11%
Printing	+8-9%
Distribution	+17%
People	+10-12%

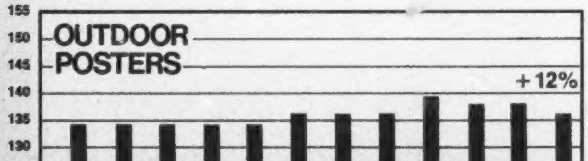
The publishers have actually done a lot to tighten ship. They have in recent years gone to lighter weight paper — but that avenue has just about run its course. Not only has paper weight been cut down about as far as it should go in most books but also problems in availability of the lighter weight stocks have put a crimp on that expedient.

"A lot of work has been done on publisher housekeeping," Mill says. For example, on short-run offset publications the waste in paper used to run 35-40%, but that has been cut down.

Then there is the trend to in-house composition — as opposed to letting the printer do all the typesetting. There are certain economies in time as well as people in this kind of an operation. ABP would not be surprised to find that within the next five years virtually all typesetting of business publications will be done in the office of the publication.

More use of color is a factor. ABP estimates that today two out of every three ads in business publications are in color — half of that in four color. This has grown out of the almost complete conversion of the business press to offset printing, which furnishes good color at less cost — especially when it is used in large quantities.

The savings in offset color are reflected in publication pricing of black and one color and four color. Perhaps more importantly, the costs of preparing and shipping color art has been sharply reduced.



Source: Buyers Guide to Outdoor Advertising, 1980-81. Costs of Top 50 Showing in top 50 markets.

JWT estimates based on reported SRDS cost of a P4/C for 3 newspaper distributed magazines. **Daily Newspapers**/JWT estimates based on reported SRDS cost per agate line for the largest metropolitan daily in the top 50 SMSA markets. **Business Publications**/JWT estimates based on reported SRDS cost of a P4/C for 46 magazines representing 42 business and professional classifications. **Posters**/IOAA reported rate card costs extracted from the Buyers Guide To Out-door Avertising for a 50-showing in the top 100 metropolitan markets as defined by Sales Management. **HOW TO READ:** Media Cost Index reflects latest available cost compared to base of average year 1977. Percent change reflects annual rate of change and is based on latest available month compared to same month previous year.

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D.C.

Premiere is down for the count

As the new year came in, it looked like Premiere, the planned pay tv service, was on the way out. A federal court in Brooklyn, New York had issued an injunction on anti-trust grounds to keep the movie network from starting up.

At presstime, Premiere had filed an appeal on the ruling, according to M. Christopher Derick, Premiere's president.

However, because of "the way the decision was written," Premiere had no choice but to begin laying off personnel and closing its doors last month, Derick explained.

Premiere is chaired by broadcast millionaire Burt Harris, and is backed by Getty Oil, Columbia Pictures, 20th Century-Fox and MCA.

Getty had put up 75% of the money for the movie network, and the film companies agreed to give Premiere nine-month exclusivity on tv rights for all films they produced.

The exclusivity clause is where Premiere's problems began. The studios involved in the project claimed in court that already existing HBO monopolized the pay market to such an extent that it commands unnaturally low prices from the studios.

Reportedly, the four Premiere studios saw the exclusivity plan as a way to open up the marketplace for their products, as well as getting HBO to boost its share of pay cable revenues.

But the Justice Department took a different view. In its suit against Premiere, Justice claimed that the service would violate anti-trust law because (a) four film companies were agreeing on a price for their product—otherwise known as price fixing-and (b) because the companies were refusing to sell to competitors.

Premiere argued in court that HBO itself already has tied up exclusivity rights for a large number of films, just as Premiere planned to do.

But existing pay services maintained that Premiere's exclusivity arrangement would effectively prevent them from doing business, since the four film companies involved produce about 40% of all U.S. films.

Premiere's appeal will be heard by a three-judge panel in the middle of this month; the decision will be released sometime in March.

Population up 11.4%, if you believe the figures

The U.S. Census Bureau managed to report its initial 1980 findings after a series of lawsuits that question the numbers.

More detailed demographic data will become available later in the year, but the initial figures show an overall population increase of 11.4% since the 1970 census, with a certified population count of 226,504,825.

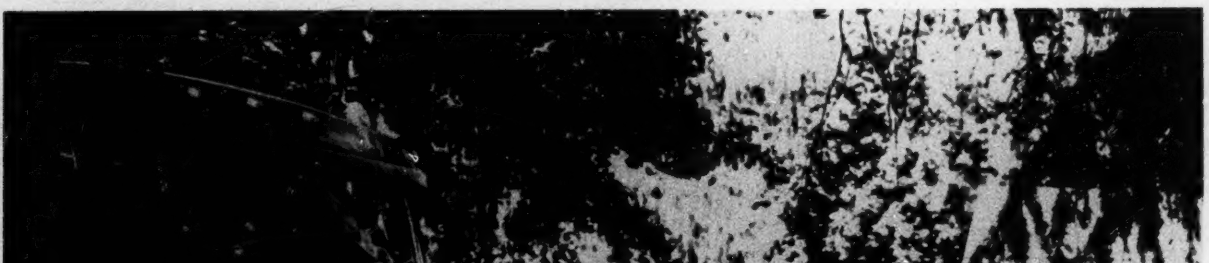
The Bureau was able to report its figures on time only after a last minute intervention by the Supreme Court. The Court overturned a lower Federal Court ruling that blocked certification pending Government appeal of New York City's successful assertion that its numbers are too low.

At right: the Bureau's figures on the top 30 cities.

1980 rank	1970 rank	City	1980 population	1970 population	change
1	1	New York	7,015,608	7,895,563	−11.1
2	2	Chicago	2,969,570	3,369,357	−11.9
3	3	Los Angeles	2,950,010	2,811,801	4.9
4	4	Philadelphia	1,680,235	1,949,996	−13.8
5	6	Houston	1,554,992	1,233,535	26.1
6	5	Detroit	1,192,222	1,514,063	−21.3
7	8	Dallas	901,450	844,401	6.8
8	14	San Diego	870,006	697,471	24.7
9	7	Baltimore	783,320	905,787	−13.5
10	15	San Antonio	783,296	654,153	19.7
11	20	Phoenix	781,443	584,303	33.7
12	11	Indianapolis	695,040	729,766	− 4.8
13	13	San Francisco	674,063	715,674	− 5.8
14	17	Memphis	644,838	623,988	3.3
15	9	Washington	635,233	756,668	−16.1
16	12	Milwaukee	632,989	717,372	−11.8
17	29	San Jose, Calif.	625,763	459,913	36.1
18	10	Cleveland	572,532	750,879	−23.8
19	16	Boston	562,118	641,071	−12.3
20	21	Columbus	561,943	540,025	4.1
21	19	New Orleans	556,913	593,471	− 6.2
22	26	Jacksonville, Fla.	541,269	504,265	7.3
23	22	Seattle	491,897	530,831	− 7.3
24	24	Denver	488,765	514,678	− 5.0
25	18	St. Louis	448,640	622,236	−27.9
26	25	Kansas City, Mo.	446,562	507,330	−12.0
27	31	Nashville-Davidson, Tenn.	439,599	426,029	3.2
28	45	El Paso, Tex.	424,522	322,261	31.7
29	23	Pittsburgh	423,962	520,089	−18.5
30	27	Atlanta	422,293	495,039	−14.7

Agents gain most in confused travel market

Influx of tourists from abroad saves U.S. carriers from drop in tourist travel. Skyrocketing energy costs and price wars wreck airline profits. But growing potential in elderly travelers has put new money into the market — and prompted some unusual advertising. The pluses and minuses in 1981.



Bus tours carry the elderly to historic shrines, famous gardens and other points of interest.

The vacation travel industry moves into the new year in a confused state. Since deregulation of the airlines, pricing of air travel has been as capricious as show business.

The giant air carriers have shed a goodly number of their least profitable routes. New small carriers have moved in to fill the voids. Cries of "cream skimmer" have been hurled back and forth among the carriers — now caught in a seemingly endless price war.

Recession has seriously dented the travel industry as a whole — particularly the luxury cruise ships at a time when they have committed themselves to add new boats. New hotels continue to be added — but mostly in business convention centers.

The "disposable income" travelers are confused in spite of a rash of advertising of new routes and new low fares. About the only segment of the industry to gain is the travel agent, who has been sought out as never before by a confused public.

The one solid growth segment is in travelers from abroad, flowing into the U.S. to take advantage of the currency differential between their home lands and the U.S.

The potentials for domestic travel are still enormous. The "golden oldies" in our population — the retired and those near retirement — represent a larger market every year — and they have the time to travel. But the freewheeling antics of the big travel advertisers, the airlines, has them clutching their pocketbooks, waiting for the fares to go even lower.

What does the future hold? In this report, we sum up what's going on now that portend of things to come.

The energy problem

One arch villain of the travel market is the zooming cost of energy. Another, of course, is the escalating rate of inflation, which has tended to erode the value of the discretionary dollar of younger and older pleasure travelers.

However, services that cater especially to the retirement category say there is no sign yet that this factor has materially affected senior citizens' disposition to use buses, cruise ships and trains.

Travel/tourism market dimension

According to knowledgeable estimates, travel/tourism expenditures by consumers in 1979 reached a level of $135 billion total in the U.S. and about $15 billion for U.S. travelers in the rest of the globe. They say the U.S. travel market will show a 10-15% increase in 1980.

Travel industry media outlay in 1979

Carriers, services	Total	Percentages
Domestic airlines	$292,500,000	42,6
Foreign airlines	24,100,000	3,5
Steamship lines	34,500,000	5,0
Buses	15,300,000	2,2
Railroads	12,400,000	1,8
Car Rentals	33,200,000	4,8
U.S. Govt., States	12,800,000	1,9
Countries outside U.S.	11,300,000	1,6
Travel services (cheques, etc.)	121,400,000	17,7
Hotels, motels, resorts	129,700,000	18,9
Total	**$687,200,000**	**100,0**

Sources: Pannell, Kerr, Forster, LNA, Media Records, PIB, TVB, RAB.
Note: The CAB estimates that the domestic airlines spent another $155 million for all kinds of promotion, aside from measured media

The U.S. Travel Data Center, the central recipient of statistical and other information from the various sections of the travel industry, give us this view of how the business stacks up economically as it moves into a new year:

(1) The national airlines agree that regardless of any rate wars, they'll be forced to up their prices in 1981 because of drastic rises in operating costs, notably in fuel.

(2) Of all carriers, inter-city buses stand out in the profit columns — and will continue to stay there. The profit edge for the inter-city buses, reported the Center, was at least 5% in 1979.

(3) The ship cruising field passenger and revenue tallies slid in 1979, but recovered nicely in 1980.

(4) With the American dollar offering exchange advantages versus other parts of the globe, the flow of tourists (U.S. vs. abroad) did a sharp reversal our way. In 1979-80, they were pouring in from Canada, Mexico, Great Britain, Germany, South America, Japan. Tourists coming into the States in 1979 numbered 21.6 million and the U.S. Travel Service figures that this hit 22.4 million in 1980. The most favored destinations: New York, Florida, Los Angeles, Washington, Chicago, Las Vegas, San Diego, Dallas.

(5) American tourism to Europe will dip again in 1981 not merely because of the dollar disadvantage but because of the huge jump in hotel, food and other costs. This clientele has reduced its stay overseas to an average of two weeks to 10 days from a month or more.

(6) Miami has become a magnet for tourists from abroad. The eventual

Carrier advertising expenditures in 1978

Medium	Total	Percent
Newspapers	$181,749,000	48%
Magazines	42,109,000	11
Television	91,874,000	24
Radio	53,593,000	14
Outdoor	11,484,000	3
Total	**$382,809,000**	**100%**

Source: Pannell, Kerr, Forster. Estimates are that 1979 tally will show a 13-14% increase over 1978 — or about $433 million.

destination may be elsewhere, but now air tickets permit them to spend a few days on Miami Beach, even circling back from the Caribbean.

Problem spots

- The travel/tourism industry's advertising seems to have struck a snag in creativity. Travel industry critics point to too much "girl-boy" poses. They say travel advertisers overlook other targets — like the elderly, who have the time and the means to fully enjoy traveling, seeing places and meeting people — plus the maturity to judge the values of what's being offered them.
- The airlines should come up with unique packages and special discount trips that aren't too far-fetched and support these innovations with imaginative campaigns in newspapers, tv, magazines and radio as a continuing bid for discretionary dollars.
- The hotel industry isn't trying hard enough to prevail upon the powers that be in Washington to abolish the room tax, which, though it brings in $30 million in taxes, is an imposition on both the host and the guest.
- Carriers and others are letting themselves get dragged into an inactive state of mind on global tourism as a result of all the talk about inflationary factors, political unrest and terrorism.
- Travel agents complain that travel advertising is often confusing. The ads don't reveal tourist restrictions — or if they do the type is set too small for the elderly tourist to decipher.
- The airlines would find it to their advantage to get out of an advertising spending pattern that presumes that the third quarter is the end of the rich tourist season. They overlook the fact that the South isn't just Florida and the Caribbean Islands but extends across the whole U.S. continent.
- Before the airline business can approach stabilization, the three previous transcontinental majors (American, TWA, United) will have to adjust themselves to the new competitive picture. They'll have to recognize: (1) the transcontinental challenge from American, Eastern, Capital; and (2) the regionals, the feeders, the locals and other short hauls. Whether they can manage it without further disarray is the big question.

Kenneth Roman, Jr., president of Ogilvy & Mather: "In an era of deregulation, the key words will be innovation and experimentation."

U.S. weak in selling

A frequent criticism we encountered from marketers in the travel domain is that the U.S. could do a much more intelligent and aggressive job merchandising itself around the world as well as in the United States.

The situation, they pointed out, hasn't been helped by the trimming of the U.S. Travel Bureau's promotional budget from $13.5 million to $8 million. This is supposed to pay for the Bureau's Washington headquarters and eight foreign offices with 45 people.

The White House position: such bidding for foreign tourists should be subsidized by the U.S. travel market, not government.

Al Kogelman, director of the U.S. Travel Bureau, told us that if this 40.7% slash is not soon rectified by Congress all its foreign offices will have to be shut down in 1981.

Meantime the crisis has been alleviated at least in spirit by the House and Senate each adopting a Permanent Tourism Caucus which recognizes the importance of U.S. Tourism via the establishment of a Tourism Administrative Office.

Noteworthy is the fact that according to the Department of Commerce the flow of foreign tourists to the U.S. in 1979 was 21.6 million with an estimated expenditure here of $21.6 billion. The projection for 1981 is 22.4 million incoming tourists.

Lending a hand in churning up intra-American tourism are news-

Continued on page 113

U.S. Travelers by age in 1979

	Percent of population	Percent domestic airlines travelers	Percent international airline travelers	Scheduled bus travelers	Ship cruise travelers
18-24	18%	17%	15%	27%	13%
25-34	22	25	24	17	18
35-44	16	19	17	12	12
45-54	15	15	18	13	19
55-64	14	13	15	16	21
65+	15	11	11	15	17

Source: SMRB 1979 Study of Media and Markets

TRAVEL (from 76)

papers in major cities through their Sunday Travel sections.

For example, the New York *Daily News* in October got behind a three-day Travel & Vacation Exposition in the New York Coliseum, which drew 25,000 tourist prospects. It added a stimulus to the local tourism business, which because of the recession hadn't been up to snuff.

Big money in travel ad budgets

The travel industry has been increasingly munificent with their input of advertising dollars in recent years.

In fact, marketers in other "product" fields have noted, perhaps with a slight sense of awe, how the ratio of advertising expenditures has tended to run ahead of sales in the travel/tourism market.

Travel/tourism advertising expenditures have been surging at an annual average rate of 14% overall. About 45% of this came out of the airlines.

Tourism among the elderly

If it weren't for the older people, the travel/tourism market in the U.S. would have been hard put to move ahead during a period of changes in the economy.

The elderly obviously have a lot of time on their hands to search around for an acceptable package buy. They're not interested in sun and surf.

They prefer to settle down for a spell of sitting back and being catered to à la ship cruises or getting around at a leisurely pace by bus tours as sightseers, mixing with local people and absorbing the local "culture."

With time running out on them, they're disposed to comfortable, clean accommodations and well-prepared simple meals, even if on occasion they have to do the preparing themselves.

It is not uncommon for them to take anywhere from $2000 to $3500 out of principal for a two to four week vacation by bus or ship.

One thing they look for to a greater extent than do younger tourists is extra security in transit and lodgings.

Suffice it to say that it is this older generation that is responsible for the most profitable element in the travel/tourism market — the tour broker who sets up the trips.

Motor coach rides high again

Both the intercity and the brokered charter buses have been on the upbeat the past two years. This despite the slow economy and the drastic rise in energy and general operating costs.

The U.S. Travel Data Center in Washington reports that the Class I, II and III bus lines carried 360 million passengers in 1979 — 37% more than in the previous year at a gross of $1.6 billion. It looks as though they will have equalled that in 1980.

The intercity bus operators are still bitter over the U.S. government subsidy of their competitor, Amtrak. The intercity busmen believe the subsidy cost them $600 million a year in revenue — and puts a squeeze on their profits.

Both Greyhound and Trailways, the topnotchers of the bus domain, do not limit themselves to intercity traffic. They're also charter tour brokers. Like smaller competitive tour brokers, they offer fare, lodgings, food, entertainment and many incidentals at a package rate.

The Greyhold subsidiary calls itself Greyhound World Tours, Inc., and the Trailways spinoff bills itself as Trailway Leisure Travel, Inc., aiming at the older generation.

The motor coach industry is a fascinating field — and making it more colorful is the new chairman and chief owner of Trailways, James L. Kerrigan. He left Greyhound, where he had been president, borrowed money from the banks and took over Trailways from Holiday Inn, naming himself chairman.

Kerrigan, who calls himself the "Avis" of the intercity bus field and "the new boy on the block," has his own discount fare arrangement.

He works his discount offers in diverse ways. For example, he charges a pittance for a long trip. Kerrigan figures that Trailways will turn out appreciably ahead via the loss leader in that the same passenger will buy a full fare ticket back.

Another discount idea: The price from Boston to New York is at half rate but the return ride is at the full ticket.

In still another instance the cost of a trip is put at, say, $97; but when the arrivee gets off the bus he or she is handed $50.

Kerrigan builds his own motor coaches and instead of setting up his

Demographic differences between U.S. domestic and foreign travelers

Status	**Domestic**	**Foreign**	**Employed**		
Single	18.2%	17.2%	Full Time	57.1	60.4
Married	70.0	70.8	Part Time	10.9	10.6
Divorced, Widowed, Separated	11.8	12.0	Not Employed	32.0	29.0
Age			**Household Income**		
18-24	17.0%	15.5%	$25,000 or More	36.0%	41.4%
25-34	24.0	23.5	$20,000-$14,999	16.9	17.7
35-44	17.7	16.4	$15,000-19,999	16.1	13.2
45-54	18.9	18.9	$10,000-14,999	15.7	13.5
55-64	14.1	15.9	$5,000-4,999	9.7	9.6
65+	10.3	9.8	Less than $5,000	5.6	4.6

Source: Media Mark Research, Inc. Summer 1980.

own terminals he shares them in such places as L.A., Newark and Boston with an on-the-ground competitor, Amtrak.

What carrier does Kerrigan regard as his ace competitor? Not Amtrak or the airlines, but the private car. His advertising slogan: "Go Big Red — Go Trailways." The red refers to the color of the Trailways coaches, whereas the color of the Greyhound coaches is blue. He claims it's cheaper and more comfortable to ride the intercity coach than to drive, a comparison that Greyhound had been hammering away at in its advertising for many years. As a former Greyhound president, he decided to stay away from the driver image and put the associative focus on the word "red."

Bus deregulation debate

Major bus line operators seem to be torn between supporting or opposing a movement for national deregulation of their industry à la the airlines.

In the meantime the greater incentive is to duplicate state by state the action taken by the Florida Public Service Commission of doing away with intra-state bus laws.

The Florida decision now permits bus operators to set their own schedules, tours and fares within Florida without posting such intentions with the service commission.

Deregulation nationwide would remove the bus industry from the authority of the Interstate Commerce Commission — as is now the law.

Though there's some agitation in Congressional circles on the freedom of movement question, it appears that the large bus operating companies are in favor of expanding the Florida abolition to national effect. The smaller competition doubts that the concept is best for them.

Hotels like brokered tours

Hotel and motel operators around the country have a special affinity for the charter tours that come through brokers, especially those which come under the aegis of the Interstate Commerce Commission, which requires each broker to put up a security bond of $10,000.

The broker or agents get a group or wholesale rate from the hotels and motels on rooms and food. The advantage of this over individual reservations is that they don't have to worry about "no-shows." The tours cover the motels by contract.

Decisions coverage of travel marketing mayhem in 1980

"Holiday Inn's media roadshow," page 70, Dec. 1980.

"Rick Douglas's strategic search" (Guest Editor from British Airways), page 70, Sept. 1980.

Brand Report 50: Travel, page 121, February 1980.

A recent development in the charter tour business, brokers tell us, is growth in blue color trade. They don't know whether this is due to the zooming expense of private car travel or because of the economy and convenience of setting up a vacation via a tour package — one price covering every thing and one bill. This is the coach tours' sales strategy.

Added appeal for many is the tour escort, who is available at all times to help, guide and advise the tourists. For many it has the flavor of a 3 to 12-day mobile picnic.

Single women travelers boost hotel rates

The growth of women traveling alone, both tourists and on business, has caused major hotels across the country to restructure their personel setups.

One is to increase their security forces so as to have guards on floors where lone women guests are housed to protect them from male intruders.

The other is to expand their bellhop and porter staffs for baggage carrying purposes since lone women guests can't be expected or won't tote their belongings to and from their rooms.

Carriers — especially those offering package rates like buses — report that the added expense of floor guards and baggagemen have been passed on as increases in room rates.

The charter coach tours are also reaping a harvest from another source: the European and other foreign tourists coming over on Laker Airline package deals. They may spend some of their stay in the States on sightseeing before settling down for a week or so in Florida or a similar glorified sun locale.

Ship cruising has its problems

The gross revenue from cruising was about $1.8 billion in 1979 — derived from 1.1 million passengers, compared to 896,000 passengers in 1978.

The cruise ship owners describe themselves as a growth industry, but admit that berth occupancy in 1980, although 13% over '79, produced about 5% less in revenue than in the previous year.

Two problems that the cruise operators have had to contend with are: (1) stiffening competition from Caribbean airlines with their special discounts; and (2) the jouncing rate of late cancellations by intended voyagers who had booked passage with travel agents four to six months in advance.

The cruise field has been marketing itself lately on these two levels: (1) a vacation is a necessity and not a luxury; (2) the cost per day aboard a liner is about the same, if not less, as the total expenses (including flying) of a Bermuda or Jamaica stay.

Certain steamship lines cater especially to the older clientele on the theory that they can take a month off for more luxurious accommodations, higher level of service, food and entertainment.

As proof of their confidence that they're in a growth industry, the cruise people point to the fact that six new cruise ships are now in the building stage.

Americans still like trains

The privately owned auto accounts for 86% of surface tourist travel, but in 1979 there were 22 million long-haul tourists who used Amtrak and another six million independently operated railroad systems, with the revenue well over $130 million.

Amtrak headquarters in Washington told us that 70% of the consolidation's distance travelers were of the "discre-

Turnaround in tourist tide

For the first time since 1945 the number of tourists coming into the U.S. the first half of 1980 and during 1979 exceeded the number of Americans headed for overseas and western hemisphere countries.

The U.S. Travel Service reports that the inflow of tourists to this country in 1979 came to 21.6 million. This could go up to 22.4 million.

The same bureau figured that the international visitors spent over $10 billion in this country in 1979, an increase of 19% over 1978.

Origin countries that led the flow into the U.S. were Canada, Great Britain, West Germany, France, Japan, Venezuela, Mexico. The incomers from Canada slipped about 10% in 1979 but made up for it the first half of 1980.

Most favored destinations of visitors in both 1979 and 1980 were Florida, New York City, Los Angeles, Chicago, Texas, San Diego, San Francisco.

tionary income'' type. (Seems that in the travel industry the term ''discretionary income'' has become a code for the elderly and the retired.)

We were advised by the same source that the long distance passenger totals were growing, even though several routes were discontinued in 1979. The expected increase of such passengers in 1980: 13-14%.

Car rentals' bid for leisure trade

The national car rental industry admits that it has been having a difficult year and it seeks to overcome this problem by going after a greater share of pleasure traveling.

The industry's troubles stem from corporate cut-backs in personal travel.

The commercial cutbacks have applied not only to the use of rented cars but to the major hotels throughout the country. The prices for lodgings have been going sky high.

What's become common among traveling executives and salesmen is to bunch their meetings and calls into one day in a particular destination, after arriving on a morning plane, and then boarding a plane that same night for next day's meetings or sales calls, instead of remaining in the same city several days.

Obviously this skimming of traveling expense has affected the car rental operators as well as the hotel industry.

Recognizing that leisure travel is their biggest competition, the big rental car companies are concentrating on leading leisure centers like Florida, Los Angeles, Arizona.

Even before the fuel situation took hold and the commercial cutbacks started, car rentals became a fragmented business. Financing of eight-cylinder cars had become a stickler, and rental customers were leery of the gas guzzlers. The switch of advertising and other attention to the leisure areas by the renters has sparked a wave of price cutting.

Major rental companies — Hertz, Avis, National — are hopeful of a turnaround in their commercial usage if fuel costs remain static in 1981.

O&M's president assays the travel outlook

Kenneth Roman, Jr. president of Ogilvy & Mather, the agency with the largest accumulation of billings from accounts related to travel, has his own view of where the travel/tourism market is headed in the 1980's.

Roman breaks his broad demographic groups into the Younger Haves, the Younger Have-Nots, the Older Haves and the older Have-Nots.

The highlights of Roman's anticipations are as follows:

- Look for much more vacation traveling among the Young-Haves, the young singles, the childless and the two-income family units. Also among the Older-Haves.
- The Older-Haves will represent a large percentage of the people who are disposed to spend money on themselves rather than build an estate for their children. This segment of self-indulgent spenders will be a rich market for heavy travel spending as well as luxury products.
- Carrier traffic will increase as private car travel decreases, assuming energy prices continue to rise.
- Despite the rising cost of living and prices for travel, the Haves will up the degree of expenditures for travel/tourism, taking off several times a year.
- The younger group will take more shorter vacations throughout the year, via package vacations, weekend packages — cutting costs and getting the freedom of movement they prefer.
- Retired couples with fixed incomes will be inclined to the traditional tour-escorted, motor coach, multi-stop packages. Package components will be less costly because hotels will be downgraded from deluxe to

High quota of travelers among readers

The latest contribution of the Newspaper Advertising Bureau to the travel market is a study showing that the more vacationers travel the chances are they'll take another trip.

Another central point that the study revealed is that "pleasure travel is not spasmodic and not erratic." Also that "pleasure travelers are active in all seasons."

The inquiry of the NAB regarding the travel business was based on responses from 800 adults in eight scattered metro areas who had read the previous issues of their Sunday newspapers.

The results further disclosed that "Sunday newspaper readers as a group are more likely to have taken vacation trips."

Likewise a sizeable majority (39%) regarded a yearly vacation trip as "a necessity rather than a luxury."

Some statistics: (1) nine out of ten readers of newspaper travel Sunday sections travel for pleasure during a year; (2) more than half take two or more trips.

first class or from first class to tourist class.

- Travel marketing will be quite different. The key words will be innovation and experimentation. The airlines will use promotional fares as a means of inventory control.
- Travel agents will tend to become "service agents." They will "customize" travel to the client's needs, charging a fee for the service (instead of depending solely on a commission from the carriers). They will move toward electronic communications, computer systems.

Wall Street scans the market

We asked Wall Street analysts of the travel carrier for an outlook.

They put a lot of emphasis on the volatility of the energy situation. They are concerned about fuel prices.

Those we tapped for opinions expect price discounting of fares to continue.

A major cause, as they see it, will be the continuing trend of competition from new airlines in the regional and smaller routes. For example, the West Coast will have 20 of them battling for the traveler's fare. Since business travel appears to be on the downbeat, they foresee a consumers' market.

Other influential negatives will be the tight credit situation, expanding inflation and uncertain monetary cooperation between a new Administration and the Congress.

Also down the line: a further redistribution of market shares — similar to what took place following deregulation of the airline industry.

Marge Crough, transportation analyst at Value Line, told us that where the pleasure travel industry may feel the pinch is among travelers with discretionary incomes. Despite the reduction of travel costs, promotional discounts and otherwise, people will be inclined to take shorter and more frequent trips, scheduling them to take advantage of special rates.

Robbins Maxwell, transportation industry analyst for E. F. Hutton, observed in an interview with us that even though the number of airline passengers was down in 1980 the prospects are for a pickup of at least 4% in 1981, due to an improved economy.

Maxwell foresees a healthy future for the airline industry, more new, regional airlines, more classes continuing to spring up, thereby injecting a promotional thrust that will capture the attention of travelers.

We asked him what personalities seemed to be on their way to making their mark on the carrier industry. He cited Frank Lorenzo, of Tex Air and LaMarr Muse, of Southwest Airlines, who's inaugurating Muse Airlines.

Another operation to watch, added Maxwell, is USAir, which is talking about starting an airline separate from Texas International. This move would be opposite to the merger trend that Wall Street sees for the industry in 1981-82.

Michael Armellino, transportation analyst for Goldman Sachs, holds that allowing for a slow recovery rate with the turn of the year, the airline industry should increase its revenue in 1981 by 15%, based on a 2% jump in overall traffic.

Ben Bodec

Don't let the Runaways get away.

It happens every year. Travel/Holiday readers run away from home more often and to more places than the readers of other travel magazines.

Every year Travel/Holiday readers spend at least 45 days high-tailing it from home. These Runaways roam the globe overseas. They cross north and south of the border. They escape into every state in the Union. What's more, there are 3,135,000* of these incorrigible Runaways. They work hard (they've got the incomes to prove it) and they play hard. As the figures below show, they're ripe prospects for any travel-oriented advertiser. And you can reach them at the lowest cost per thousand of any travel magazine on the market. Get all the facts from Ruth Halpert, Advertising Manager, Travel Bldg., Floral Park, N.Y. 11001 (516) 352-9700.
Don't let the Runaways get away from you. *Source TGI.

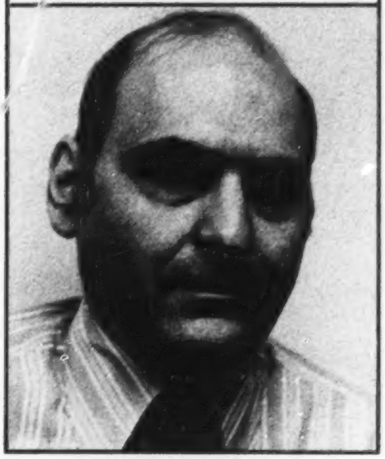
98% traveled or took a vacation in 1980.
78% took one or more foreign trips in 1980.
50% took two or more trips in the Continental United States.
90% took one or more trips by plane in 1980.
19% took one or more shipboard cruises in 1980.
50% used rent-a-cars in 1980.
Above data from a readership poll tabulated by Computer Marketing 1980.

#1 buy for reaching people on the go.

TRAVEL HOLIDAY

AS THEY SEE IT

MEDIOLOGY
by ED PAPAZIAN



Facing the challenge of the 1980's

Whether they admit it or not, newspaper publishers are concerned about the general circulation trends that have developed over the past decade and a half. While there are notable exceptions in certain markets and areas of the country, the circulations of many papers are not growing and in quite a few cases they are declining, slowly but steadily.

The over-all effects are dramatically illustrated by the following comparison of daily newspaper audiences as reported by Audits & Surveys and the latest Simmons Market Research Bureau (SMRB) study for 1980. In 1961 Audits & Surveys found that 80% of the adult population read one or more papers on an average weekday and demographic breakdowns indicated a favorable pattern with 89% of the college educated and professional/managerial populations reading daily while corresponding proportions for "downscale" segments were considerably lower. There was a softness among young adults, however. Those under 30 were 6 points below the all-adult norm while those between the ages of 30-54 were above-par readers.

Simmons' 1980 study offers quite a contrast to the rosy picture painted in 1961. Currently, only 67% of all adults read a paper daily and, as the table indicates, the attrition over the past 19 years has been heaviest among younger adults, and interestingly, among people at the *middle* of the socio-economic spectrum (see table A).

A lot of factors are at play here. Some are primarily economic — dealing with papers folding due to union/management relationships, strikes, etc. Other problems are a function of the shifts in populations to the suburbs. And, of course, we must not ignore the impact of competitive media. A continuing series of studies by the Roper organization, conducted for The Television Information Office, traces the dramatic growth of television as a major source of news about what is going on in the world between 1959 and 1978 (See table B).

Even more significant is Roper's finding that 34% of his most recent sample cited tv as their *exclusive* source of major world news, compared to only 19% for newspapers. In 1959 both media were about even in this respect (newspapers — 21%; tv — 19%).

An independent analysis I conducted several years ago shows why this change occurred. Using local and national tv audience surveys from the early 1950's to the late 1970's I traced the growth of tv news programing and cumulative effects this had as recorded by the rating studies.

In the late 1950's the networks ran

Table A: Percentage of U.S. adults reading a daily paper — average weekday

	1961	1980	
All Adults	80%	67%	−16%
By age			
18-29	74%	61%*	−18%
30-54	83%	71%*	−14%
55+	78%	71%	− 9%
By education			
College Grad.	89%	78%	−12%
1-3 Yrs. Coll.	88%	73%	−17%
H.S. Grad.	87%	69%	−21%
Not H.S. Grad.	72%	62%	−14%
By occupation			
Prof./Mgr.	89%	77%	−13%
Cler./Sales	89%	72%	−19%
Crafts/Foremen	82%	66%	−20%
Other Emp.	69%	61%	−12%
By numbers of papers read			
One only	59%	54%	− 8%
Two or More	21%	13%	−38%

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* The age groups here are 18-34 and 35-64

SOURCE: Audits & Surveys Study 1961, SMRB 1980

15 minute nightly news shows (weekdays only) in the early evenings and most affiliates matched this with a local 10-15 minute entry of their own, plus a 15-30 minute late newscast. With this limited diet to choose from the average adult watched only 40 minutes of tv news weekly — or about three telecasts.

The current situation is quite different. Now the networks run 30 minutes of news nightly (and on weekends) while most network stations air at least an hour and often 2-2½ hours of local news daily. This coupled with news on independent channels, cable tv, etc. has increased the amount of such programing enormously and the average adult now spends more than *three hours* weekly watching it.

The rise of all-news radio stations in the late sixties and early 1970's and the increased circulation of news magazines along with publications like *People, Us,* etc. has had an impact too. And it's not just confined to news, generally.

Sports was an important component of the news in the 1950's and many of us looked to our local papers for detailed sports reporting and critiques. But the tremendous surge in tv sports coverage and the growth of sports magazines of all shades and descriptions has satisfied most of our needs in this regard. And again newspapers seem the losers.

It's easy to sit back and label newspapers as an outmoded medium, but I think that's taking a cheap shot. Also, it's much too simplistic. While the trend lines have become disturbing, the newspaper concept is far from dead. And publishers are exploring new ideas to adapt their wares to suit current needs.

There is increasing interest in newspaper-distributed magazines of all sorts and descriptions, particularly on weekends, and new suburban editions on weekdays, shoppers' guides, etc.

New editorial concepts are being developed to make newspapers more appealing to younger readers and there are signs that competitive media are losing some of their momentum. A lot of those expanded tv newscasts are boring and redundant. Many of their viewers are older adults who watch news as a way to kill time. As more and more video news is offered (currently by independents and cable) tv news audiences are fragmenting and there is an undercurrent of negative reactions against their "me-to" aspects as well as the trivial subjects they cover, the blatently show-biz treatment of the "happy newscasters," etc.

The news boom has peaked in other media. It's still very important, but fragmentation has set in, especially in print. The circulations of the mass news magazines appear to have stabilized and important areas like science

Table B: Media cited by adults as the source of most news about world events (Multiple answers included)

	Newspapers	Tv	Radio	Magazines
12/59	57%	51%	34%	8%
11/61	57	52	34	9
11/63	53	55	29	6
11/64	56	58	26	8
11/67	55	64	28	7
11/68	49	59	25	7
1/71	48	60	23	5
11/72	50	64	21	6
11/74	47	65	21	4
11/76	49	64	19	7
12/78	49	67	20	5

SOURCE: A continuing series conducted by the Roper Organization, Inc., sponsored by The Television Information Office.

are now serviced by a whole new field of magazines devoted to this subject.

The next decade will witness many changes in the make-up of media.

Tv is certainly headed for a revolution as new electronic communication technologies are developed and more specialized audiences are targeted.

Radio station formats are evolving even more selectively and AM stations have finally decided to play the FM game — with more finely segmented and contemporary approaches.

Magazines, by definition and the pressure of economics, are selective vehicles.

And then there are newspapers. How will they adapt? Will the emphasis be on newspaper-distributed (and edited) magazines? Will daily formats change? Can major market papers cover the suburbs with special daily or weekly editions?

I hope that advertisers will be as supportive to newspapers as they have been to magazines and more recently to cable tv. It would be a shame if new ideas from newspaper publishers aren't encouraged and developed properly because advertisers and agencies remain aloof, withholding their funding and creative inputs. Let's hope that we have learned enough from past mistakes not to make more of them. ■

BUSINESS PRESS

by MIKE WALSH

vp-media Aitkin Kynett, Philadelphia

A look into the 80's

It always seems that at the end of any year, we take a few minutes to look forward into the coming year. These future observations involve personal as well as business subjects. As personal views are, hopefully, predictable to some extent, I spend more time in "guessing" those things that may develop which could affect my business.

As an appreciable amount of my time is spent in analyzing and recommending business publications for our clients, it is only natural that, in looking "down-the-road," my thoughts turn to this medium. The business press has long been regarded as an extremely effective means of targeting-in on specific advertiser buying influence audiences. While there have been inroads made by other media such as general management and newsweekly magazines as well as selective programing on television and radio, the business press has never really been seriously threatened by other media.

However, in looking not only into next year but into the entire decade of the 80's, there certainly appears to be a serious competitor evolving for traditional media and, not too surprisingly, for business publications. This medium, cable television is getting a huge amount of publicity in all media and is causing great concern particularly among the tv networks. One major agency predicted last June that cable and satellite programs would actually lead to the demise of one of the big three commercial networks. Whatever the final result may be, cable tv will become a definite force in the media field during the 80's.

One innovation cable will bring is both in the wide variety of programing it can offer as well as its highly selective audience concentration delivery. It is here where this new medium could offer a definite challenge to the business press. Currently, most industrial and/or corporate advertisers avoid the electronic media because of its high cost and scarcity of truly selective programing. Cable television can offset these negatives and, consequently may offer industrial advertisers a very attractive, unique alternative to the business press.

In looking ahead and recognizing this challenge, the business press as a group (ABP, for example) should be giving serious thought and planning definitive action to combat the possible inroads cable tv could make on their business.

This action might take the form of good collective research on audience and the degree of "through-the-book" readership patterns.

While we all generally accept the selective circulation delivered by most business publications, the question persists as to the degree of exposure opportunity afforded by a given issue of a publication.

Individual advertisement or reader preference studies are not enough. An industry-wide research project is called for and can only be accomplished or afforded by a multi-publisher joint effort.

Perhaps the future challenge offered by the "new," widespread cable tv emergence will generate the initiative and cooperation necessary for such an undertaking. ■

CABLE, ETC.

by NED GELBAND

vp-media & programing, Jordan, Case & McGrath

Another watershed year for cable

As cable-delivered television enters a more aggressive phase in its relationship to the advertising community, it would appear a reasonable time to look at some of the major events of the past year and predict possible trends for the coming year.

1. General growth. In the past twelve months the total domestic cable subscriber base has grown from 16 to 19.3 million, a rate of approximately 20%.

SCHEDULING GUIDE TO AD READERSHIP STUDIES

With this list of corrections and additions, J. Wesley Rosberg, senior vice president, Administration, Meldrum and Fewsmith, Inc. wraps up the most comprehensive listing of readership study schedules, by publications ever published. An important addition to the listings for consumer publications and for general business, management and news publications are the new listings for Gallup & Robinson (MIRS) studies. Box below is based on additional data regarding previously uncovered 1980 studies and the changes, corrections, and additions to our 1981 schedules. Rest of list was carried in last two issues.

1981 READERSHIP STUDY DATES

CORRECTIONS TO PREVIOUS LISTINGS

Specialized business publications

Automotive Industries — Ad Chart: delete April; add May

Commercial Car Journal — Ad Chart: delete April, July; add May, *September.*

Datamation — Ad-Q: delete February, October. Add Harvey: February, April, October

Iron Age (National Edition) — Ad Chart: delete Jan. 5, Mar. 2, May 4, July 6, Sept. 7, Nov. 2. (Above dates are Iron Age Metalworking Edition only).

Paperboard Packaging — Readex: January cancelled.

Professional Remodeling — Readex: Correct dates to read; February, May, October

Correct Service Name for: *Energy Management Report, Petroleum Engineer International, Pipeline & Gas Journal,* should be: Reader Interest Study, Not Reader's Choice

Consumer publications

Audio — Readex: Correct dates to read; April, July, September.

Health care publications

Physician & Sportsmedicine — Correct service designation from Nova to Re-Play. Previously listed study dates are correct.

Dental Survey — Readex: Cancel all studies, publication is being suspended after January 1981.

Farm publications

Beef — Readex Red Sticker: delete October, add September.

NEW AND ADDITIONAL LISTINGS

Specialized Business Publications

Billboard — Ad Sell: Mid-February

Building Design & Construction — Add Harvey: January.

Coal Age — Advertising Performance: April, June

Computer Design — Readex: May, October

Electro-Optical Systems Design — Cahners: Feb., June, Sept.

Engineering & Mining Journal —Advertising Performance: February, May.

Geyer's Dealer Topics — Ad Call: March

Independent Agent — Harvey: January, July

Industrial Education — Readex: March, October

Magazine Age — Ad Chart: February, August

Marketing & Media Decisions — Starch: March, July, November

Material Engineering — Starch: Add February

Meetings & Conventions — Harvey: January

Oil & Gas Digest — Ad Chart: March.

Paperboard Packaging — Signet: Jan.

Semiconductor International — Cahners: March, July, Dec.

Solar Heating & Cooling — "in-house": Feb., March, April.

The Specialist — Ad Chart: May/June

Consumer publications

Family Circle — Starch: Jan. 13, Feb. 3, Mar. 17, Apr. 7, May 19, June 9, July 21, Sept. 22, Oct. 13, Nov. 3, 24, Dec. 15.

High Fidelity — Harvey: March, November

National Geographic — Starch: Add February

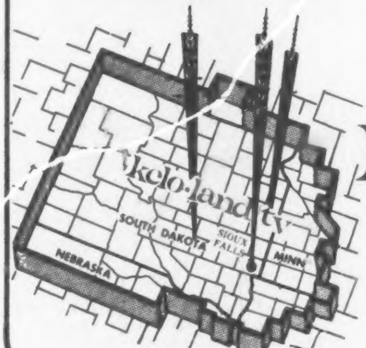
Working Woman — Ad Chart: March

Continued on page 108

	1980 actual		1981 scheduled	
Publication class	**Publications**	**Number of Studies**	**Publications**	**Number of Studies**
Consumer publications	59	332	63	331
General business, management and news publications	23	311	20	273
Specialized business publications	303	1084	306	1109
Health care publications	44	155	45	152
Farm publications	26	31	27	39
Canadian publications	15	26	8	17
Totals	**470**	**1939**	**472**	**1925**

Arbitron chalks up another 1st for Kelo-Land TV

KELO-LAND TV tops the ADI ratings of all equal-facilities markets nationwide. And outscores both other network affiliates in its own market by a wide margin. KELO-LAND TV — a "must buy" if there ever was one.



A CBS AFFILIATE

kelo·land tv

KELO-tv SIOUX FALLS, S.D.
and satellites KDLO-tv, KPLO-tv

Source: Arbitron Sweep, July 1980.
Men & women 18-49. Total day, Sat.-Sun.

Represented nationally by HR In Minneapolis by WAYNE EVANS

WE'RE CONVERTING.

Beginning March 1, 1981, the Bangor Daily News is converting to a six on nine format.

This new format means a more pleasing, easy-to-read six column news side, plus nine column advertising that's in line with most major papers in the country.

Plan on converting with us.

Bangor Daily News
Contact Sawyer-Ferguson-Walker

AD READERSHIP (from 106)

Farm publications

Irrigation Age — Readex Red Sticker: March

Health care publications

Nursing '80 — Harvey: January, April, July, October

Laboratory Management — Ad-Q: February, June, August, November

G&R STUDIES

The following Gallup & Robinson (MIRS) studies are in addition to previously listed studies by other research services.

Consumer Publications

Better Homes & Gardens — G&R: March, May, December

Cosmopolitan — G&R: February, April, August, October, December

Family Circle — G&R: Apr. 7, Sept. 22

Glamour — G&R: March, June, September, November

McCall's — G&R: February, July

People — G&R: Feb. 23, May 25, Sept. 28, Oct. 19

Playboy — G&R: March, June, September, November

General Business, management and news publications

Business Week — G&R: Mar. 9, May 4, Aug. 17, Oct. 5

Newsweek — G&R: Feb. 9, Apr. 6, May 18, Jun. 15, July 13, Sept. 21, Nov. 16, Dec. 14

Sports Illustrated — G&R: Apr. 20, Jun. 22, Aug. 24, Sept. 14, Oct. 26, Nov. 23.

Time — G&R: Jan. 19, Mar. 16, Apr. 13, Jun. 8, July 20, Oct. 12, Nov. 9, Dec. 7.

International Management (Europe —Ad-Evaluator: March, July, Nov.

International Management (Latin America-Spanish) — Ad-Evaluator: March, July, Nov.

International Management (Middle East-Arabic) — Ad-Evaluator: May, Sept.

CANADIAN PUBLICATIONS

Engineering — AdQ: March, June, August, Nov.

Motor Truck — AdQ: March, June, Sept.

Plant Management & Engineering — Starch; March, Oct.

Brand Report 62:

Deodorants

The $600 million deodorant market is still recovering from stagnant sales partially caused by bad publicity about flurocarbons in the earth's atmosphere. Marketers have responded with a flurry of alternate product strategies with stick deodorants showing the best increases so far. Nine leaders spent $77 million in major media in 1979.

The deodorant market has gone through some dramatic cycle swings, but now is forging ahead with new products to capitalize on an ever present concern about smelling good.

The industry managed to double sales in the late 1960s and early 1970s. Success striving individuals who found themselves in increasingly stressful situations and a growing number of physical fitness freaks contributed to the livelihood of the business.

That was before the banning from the market of aerosols, which had been the fastest growing segment of the category ultimately capturing 80% of sales.

Though the fluorocarbons in aerosols, which were found to be harmful to the ozone layer of the earth's atmosphere, were replaced with hydrocarbons, unfavorable publicity hurt deodorant sales.

The $600 million market still is recovering from that dip. Retail sales only increased 2.5% from 1978 to 1979, not even keeping up with inflation.

Marketers have responded to the aerosol scare by introducing deodorants and anti-perspirants in about every form possible – creams, roll-ons, sticks and pump sprays.

Aerosols now account for less than

half of deodorant sales. Sticks are showing the largest sales increases, but still have only a slight share of the market. Roll-ons have proved more popular with consumers but sales have not moved as rapidly as for sticks.

Giants in the health and beauty field compete for deodorant sales.

Procter & Gamble is the leader with a 20% market share gained from sales of its long-established Secret brand and its newer but highly successful Sure anti-perspirant.

Gillette is prospering from the introduction of Dry Idea, a roll-on that is leading the industry in sales growth, picking up the slack in aerosol sales. Gillette also markets Soft 'n Dry for women and Right Guard for men. These three products give Gillette 16% of the market.

Bristol-Meyers, another giant with 16% share, has been heavily promoting Ban roll-on, the first roll-on on the market, and Tickle, a roll-on introduced three years ago to a young female audience.

A smaller yet strong contender is Carter-Wallace with its extensive line of Arrid products, accounting for approximately 10% of the market.

It has been extremely difficult for newcomers to establish brands among these leaders, who can afford the large media budgets to launch reformulated products or new brands.

Armour-Dial, which markets Dial soap, has not managed to duplicate its soap success in deodorants. Mennen Co., however, has achieved marketing success by heavily promoting its stick application.

Another factor inhibiting newcomers: the leaders have permeated the market with not only highly successful brands but also with every conceivable variation for these brands.

P&G, for example, has 23 different products, Gillette, has 43, Bristol-Meyers has 27 and Carter–Wallace, 31.

Money spent to promote these products has remained as static as sales have recently. Spending was up 8% in 1979 for a total of $96 million for the entire deodorant category, with no significant increases in figures for the first six months of 1980.

> **"Total spending was up 8% in 1979 for a total of $96 million for the category."**

But there has been a shift in advertising strategy – aerosol advertising has been cut back in order to promote roll-ons and sticks.

In order to launch Dry Idea, the most heavily advertised brand in the market, Gillette reduced spending for its Right Guard line by 61% since 1977, from $27 million to $10.5 million. Gillette doubled spending for Dry Ideas in 1979, increasing it to $10.5 million.

A new type of application receiving increased support are anti-perspirant solids. Data from the first six months of 1980 show that Procter & Gamble spent $2.4 million to promote its new Secret anti-perspirant solid while it backed a similarly applied. Sure brand with $4.5 million.

Although P&G was the first to take its anti-perspirant solids national, Carter-Wallace is following with its version this April, and Right Guard plans an entry for 1982. Mennen has an anti-perspirant solid in test market.

By far, television is the medium for deodorant advertisers. Network television holds 80% of the deodorant ad money followed by spot television with 11%. Magazines get an 8% share, leaving less than one percent each for newspapers, newspaper supplements, network radio and spot radio.

Marketers said television provides the best opportunity to visually establish the need for an effective deodorant. Deodorant commercials are filled with examples of nervous individuals in stressful situations, ranging from high school teachers biting nails in anticipation of a class visit by the principal to the young female reporter covering an undressed sports team.

Of the leading contenders for deodorants sales, Procter & Gamble uses the most print, about 15% of its budget, compared to an industry-wide average of 8%. Gillette also tends to be a larger user of print than its competition, putting as much as 12% of Soft'n Dry's budget into print but much less for Right Guard and Dry Idea. Carter-Wallace traditionally has put the least amount of money into print. It currently has no print campaign.

1979 media expenditures for leading deodorant advertisers
(In thousands)

	Total	Magazines	Newspaper supps	Net tv	Spot tv	Spot radio	Newspapers
Sure	14,799.3	1883.7	139.6	10,531.2	2,240.4		376,829
Secret	13,186.1	1830.7		9,256.4	2,103.4		88,223
Dry Idea	10,491.1	823.6		8,487.1	1,180.4		
Ban roll-on	7,286.8			6,653.1	633.7	23,588	
Tickle	5,639.1	278.6		5,223.2	137.3	6,431	
Arrid Extra Dry	6,759	466.3		6,149.2	143.5		1,435
Soft'n Dry	4,411.1	550.4		1,946.3	1,914.4		
Right Guard	10,475.2	240.0		10,197.5	233.2		
Mennen	3,726.0	49.9		3,292.6	383.5		

Source: Leading National Advertisers, Media Records and Radio Expenditure Reports

Following are marketing and media strategies for the most successful brands.

Bristol-Meyers

Apparently convinced that roll-ons are the wave of the future, B-M has invested most of its media money in two roll-on/ products. One getting heavy support is its long-time leader in the roll-on category, Ban roll-on, which in 1979 was supported with a $7.3 million budget, a huge increase from the previous year.

The brand has been feeling the heightened competition in roll-ons: the current print campaigns reminds readers that Ban is the most effective roll-on on the market, just in case you forgot.

The other roll-on Bristol-Meyers supports heavily is Tickle, which is pitched to the young female audience with the help of an introductory $8 million ad budget. That has since dwindled to a steady $5 million media outlay.

ban
Just a reminder. Ban Roll-On stops wetness better than any leading anti-perspirant spray.
ban

Bristol-Meyers is heavying up media for Ban and Tickle.

Ban Basic, a pump spray that B-M backed with more than $11 million in advertising to establish when aerosols sales were hurt, is no longer promoted. A trade source said that the packaging of pump sprays and the wetness of the application hurt pump spray sales.

B-M has given minimal support to its Ultra Ban line in the past few years. However, the company did spend $2.4 million for Ultra Ban II in 1978, an anti-perspirant spray, but in 1979 this brand too went the way the of the other Ultra Ban products.

Gillette

The company is aggressively moving ahead with its newly successful Dry Idea, its women's oriented brand, and Soft'n Dry for males.

Dry Idea's media budget was doubled in 1979, one objective of that increase being to establish the brand as for both men and women. It currently is more popular among females. One indication of that goal is the plain dark blue packaging of Dry Idea compared to the pink and purple flowers in Soft'n Dry's packaging.

Although print helped to launch Dry Idea, last year no print support was employed. Prime and daytime television convey the message that Dry Idea "goes on drier, stays on longer and keeps you drier . . . You'll give up before it does."

Dry Idea sales are leading the industry in growth despite its price, which is 30 to 40 cents higher than the competition's.

For Soft'n Dry, Gillette is taking a new competitive track. A campaign begun in August promotes this brand as more effective than the leading roll-on, Ban.

But the company is maintaining the basic theme that "nervous is why you need Soft'n Dry," a jingle heard in variety of television commercials in prime time, fringe and day spots.

A $3.4 million budget is allocated to this campaign, which has been running for four years. That is an increase over 1978's budget of $2.7 million.

The brand occasionally appears in print. When it does, it usually is found in younger female books like *Seventeen* and *Teen* plus a section of the fashion book.

While Gillette's Soft'n Dry and Dry Idea are more appealing among females, its long-established Right Guard line is proudly touted as being for men only.

Television commercials budgeted in 1979 at $11 million demonstrate that men sweat more than women, and that therefore they need a more effective formula, like Right Guard's. That unpleasant fact is buried in pleasing vignettes of couples involved in strenuous physical activities like mountain climbing. After the two reach the top together, the man exlaims how right he was to use Right Guard.

Right Guard's media support has been drained in recent years to launch Dry Idea. The brand's once $27 million ad budget is now $11 million, a 61% reduction. Still, Right Guard is the fourth most heavily advertised brand in the industry.

The two types of applications still heavily supported are its anti-perspirant spray, with a $7.4 million budget, and its deodorant stick, at $3 million. Right Guard roll-on has claimed fewer and fewer media dollars as Dry Idea has taken over.

Procter & Gamble

The leader in industry sales, P&G also takes the lead in media dollars. Secret's ad budget was $13 million and Sure's $15 million in 1979. Both products are supported with steady media increases. Secret's promotional

Deodorant sales by category

	(in millions) 1979	1978	% change
external deodorants	$633,590	$617,976	+2.5
aerosol	298,476	351,876	−15.2
roll-on	245,450	191,021	+28.5
stick	41,043	24,224	+69.4
pump	15,168	14,793	+2.5
cream	26,278	28,942	−9.2
pads	3,210	4,507	−28.8
powder	3,965	2,613	+51.7

Source: Product Marketing magazine

money was increased 10% in 1979 while Sure's was increased 16%.

Sure is strictly an anti-perspirant while Secret is both an anti-perspirant and a deodorant. Much more support is given to Secret deodorant – $11 million – than the $2 million-plus spent for the brand as an anti-perspirant.

P&G has been trying to give new life to its long successful brand, Secret, with new creative approaches. Its campaign of two years ago, which shows a daughter discovering Secret only to find that her mother has been using it for years, has been changed to something more flashy.

"But this special edition is for women only. Sorry, fella."
EXTRA!!! SECRET SOLID'S STRONG!

P&G is trying to give new life to Secret with a new creative approach. The brand gets $11 million in advertising support annually.

Its new ads show glamorous looking women in sexy clothing at discos, at the center of attention despite the fact that they are parading around with a can of Secret. The men eyeing them want to know if they too can try Secret, but even though it's strong enough for a man, it's only for women, the ads explain.

The Sure message is a little more down to earth. Its main point is that Sure is so effective that it provides an extra day of dryness in the unlikely event that you wake up without a bottle or can nearby.

That year-old message is broadcast in network and spot television plus print ads that appear in *Good Housekeeping, Coed, Cosmopolitan, Seventeen, Teen, People* and *Reader's Digest*.

Although the Sure products are advertised as a group in most ads, an improved Sure roll-on plus the introduction of Sure anti-perspirant solid have meant additional ads for these applications.

Carter-Wallace

At one time a market leader with its Arrid aerosol, Carter-Wallace was hurt by competitive pressure from the bigger three contenders and from declining popularity of aerosols. But it is gaining ground once again as the competition emphasizes other types of applications. *Product Marketing* magazine reports that C-W has cornered 12% of aerosol sales.

Carter gives the most media weight to its Arrid Extra Dry anti-perspirant spray although it has been spending extra dollars on other forms of applications including a powder roll-on and Extra Dry roll-on deodorant.

Spending in 1979 for the anti-perspirant spray was down but figures for the first six months of 1980 show that the brand may be coming up to its 1978 level of $7.8 million. Its powder roll on was heavily supported in 1979 with a $3.5 million budget up from only slight support in 1978 when it was in test market.

The "get a little closer" theme of its television commercials during prime, day and fringe is used for each Arrid product marketed.

Although Arrid may regain some of its lost strength with the national introduction of its anti-perspirant solid, this spring, the company has been showing signs of weakness.

While its competition has been steadily increasing ad dollars, Carter-Wallace has been cutting back. The Arrid line has seen a 19% reduction in spending from its 1977 level of $12.7 million.

Mennen

The Speed Stick manufacturer has been one of the more aggressive competitors. It was able to profit by heavy promotion of Mennen Speed Stick as an alternative to sprays during the aerosol scare.

"Mennen poured an additional 19% into advertising in 1979, which followed a 29% increase the preceding year."

Mennen's television commercials, "get off the can and on to the stick," are well remembered, although the current creative has been slightly altered to the "wide stick."

Mennen is not one of the more heavily advertised brands – $3.7 million was its 1979 budget – but the company has increased Mennen's budget more than budgets have been increased by the competition.

While the standard increase in 1979 was 8%, Mennen poured an additional 19% into advertising that year, following a 29% increase the preceding year. Early data in 1980 indicate that similar or even larger increases are due for the full year.

The increased media weight and the resulting name recognition value will be needed to launch the second of the Mennen products, an anti-perspirant solid. But Mennen, the leader in stick sales, should have an edge in establishing its anti-perspirant solid in consumer's minds. That could give it quite a boost in this rapidly growing segment of the industry.

Rebecca Fannin

MARKETING & MEDIA Decisions

MARCH 1981 • $3.00

4/24/81 C2950-3 U

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Movie ad budgets up, box office down pg 147

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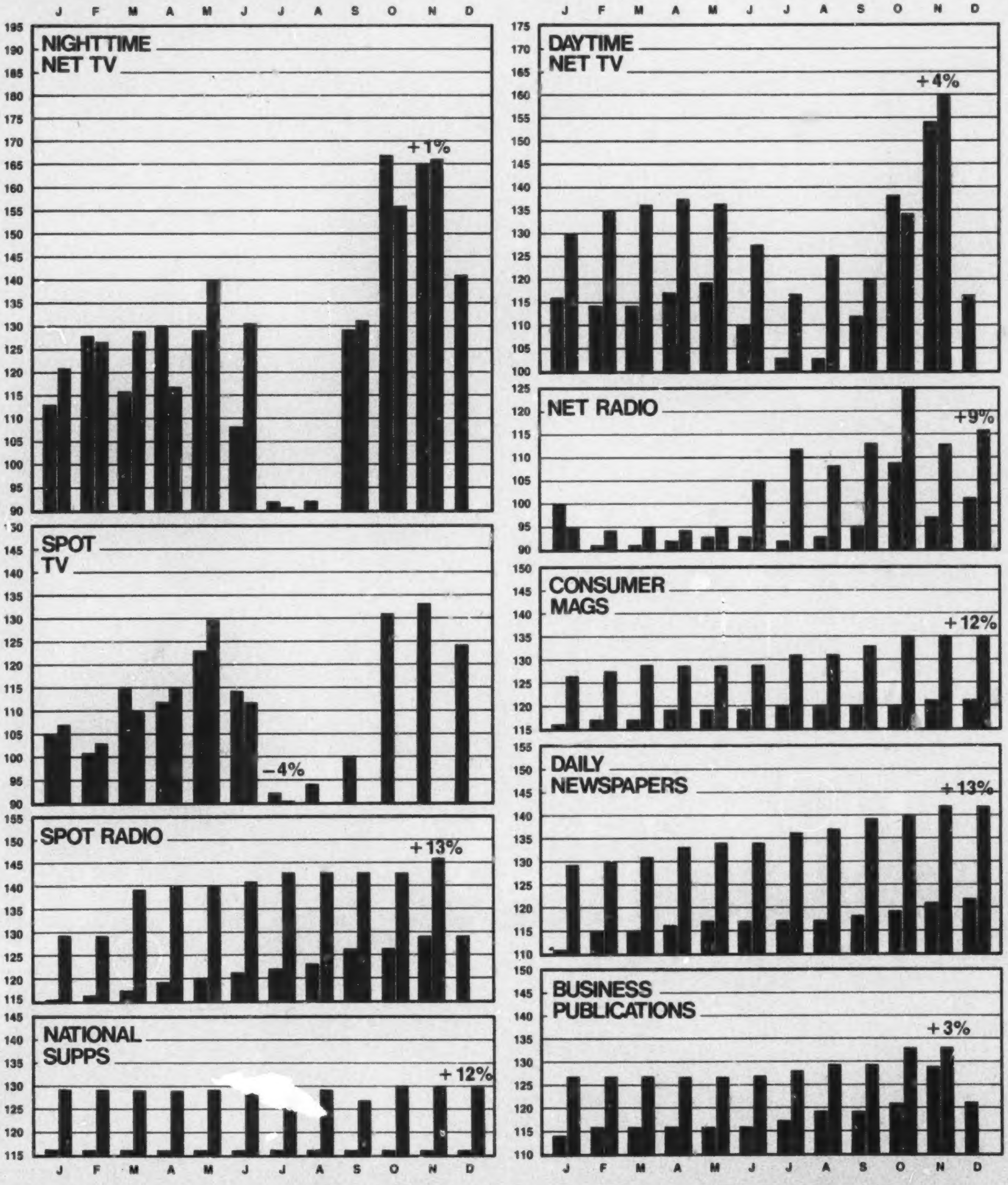
MEDIA COST INDEX

Black bars index for 1979; red bars 1980; base year 1977
Prepared by J. Walter Thompson Media Department



METHODOLOGY: The Media Cost index reflects industry reported trends extracted from available published sources. JWT Media Analysis utilized standard competitive report sources to develop comparable unit costs that reflected monthly cost trends by medium. Where industry competitive sources are unavailable, JWT sampled selected cost data from SRDS. Definition of the sources, universe, and media units used follows: *SOURCES*– **Nighttime Network TV**/BAR estimated commercial minute cost for *all* Night-time Network TV (6 PM to sign-off). **Daytime Network TV**/BAR estimated commercial minute costs for *all* Daytime Network TV (Sign-on to 6 PM). **Spot TV**/BAR CUME National Spot TV Report for estimated commercial minute costs for *all* national and regional Spot TV activity in 75 markets. **Network Radio**/BAR Network Radio Report used to estimate *all* three network (Excluding MBS) commercial minute cost. **Attention: Due to a change in BAR's source for commercial minute cost we are now using Jan. 1979 as a base for new index. Spot Radio**/JWT estimates based on reported SRDS cost of one minute on one station per market in the top 50 RADI markets. **Consumer Magazines**/JWT estimates based on reported SRDS cost of a P4/C for 30 national consumer magazines based on circulation. **National Supplements**

COST TRENDS
a Decisions analysis

The indexes on the page opposite are revised from time to time to include improvements in estimating and data collection.

One such improvement is being made by Broadcast Advertiser Reports, our data source for spot tv estimates. Unfortunately, this has delayed processing of the data by J. Walter Thompson's researchers. As a result, the most recent bars in the spot tv index are for last July. We'll catch up on this next month.

The index for newspapers has also been revised for November and December of 1980. Index for November is 142 (+14% over the year previous) and index for December is 142 (+13% over the year previous).

There are a few other media in which cost estimates are not yet available through December 1980. Therefore, we will not revise the charts for a new year of data until after the April issue. In April we'll have the complete picture for last year month by month, along with calculations of media cost trends for the year as a whole.

Meanwhile, the indexed data for some media are available into the first few months of this year (1981). Here are the 1981 data so far:

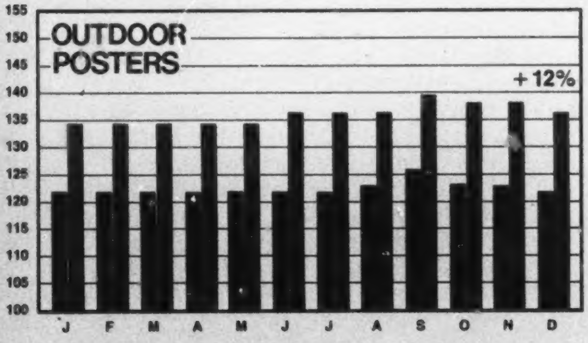
- **Outdoor** — indexed at 150 for the first three months of 1981, running 12% over 1980 in each month. This is based on a cost of $879,383 for a No. 50 showing in the top 50 metro markets — 3,507 allotments to achieve the No. 50 showing — cost per panel averaging $250.75.
- **Newspapers** — indexed at 150 for January 1981 — 14% over January 1980. Newspaper figures have been revised for November and December 1980.

Inflation in consumer print media is just about keeping pace with inflation in the economy in general, up 12% currently for consumer magazines, supps, daily newspapers and outdoor.

Business publications are more conservative in their price hikes, up 10% in November over the same month in the year previous, and up less than that during most of the earlier months in 1980.

Television did not have as good a year as expected. In November, nighttime net tv was only 1% above the year previous and daytime net tv up only 4%. For the first half of the year, spot tv averaged a mere 3% increase.

Spot radio was able to push its prices up the most — in November +13% — and month-by-month through 1980 up from 11% to 19% (the biggest hike in the month of March).



Source: Buyers Guide to Outdoor Advertising, 1980-81. Costs of Top 50 Showing in top 50 markets.

JWT estimates based on reported SRDS cost of a P4/C for 3 newspaper distributed magazines. **Daily Newspapers**/JWT estimates based on reported SRDS cost per agate line for the largest metropolitan daily in the top 50 SMSA markets. **Business Publications**/JWT estimates based on reported SRDS cost of a P4/C for 46 magazines representing 42 business and professional classifications. **Posters**/IOAA reported rate card costs extracted from the Buyers Guide To Out-door Avertising for a 50-showing in the top 100 metropolitan markets as defined by Sales Management. **HOW TO READ:** Media Cost Index reflects latest available cost compared to base of average year 1977. Percent change reflects annual rate of change and is based on latest available month compared to same month previous year.

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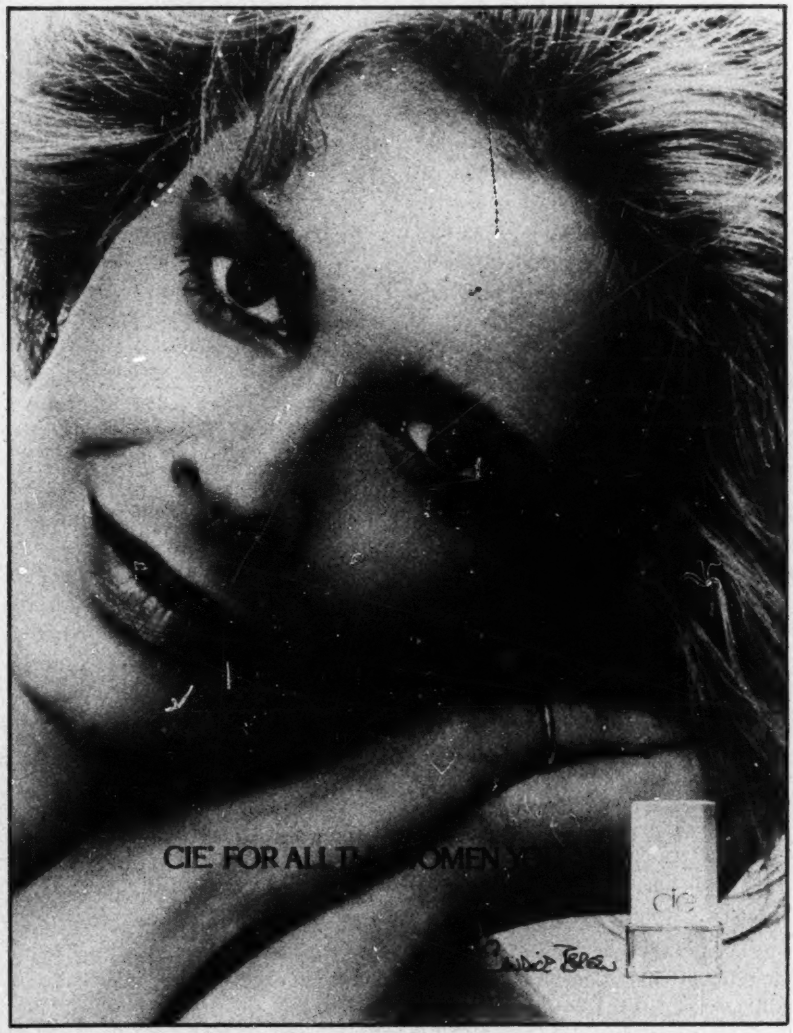
Fragrance marketers sniff out opportunities

Continuity and positioning are the new buzz words in the perfume business as the industry giants endeavor to build year-long marketing strategies. New brands are being positioned carefully to appeal to particular age and psychographic groups before millions are invested.


CIE FOR ALL TH OMEN Y
cie

Beauty and the bottle — Shulton's Cie takes the currently fashionable approach of stressing its spokeswoman Candice Bergen in ads, while Chanel (opposite page) abandoned its spokeswoman, Catherine Deneuve to adopt a stark but strong package registration campaign.

Was there ever a romance without perfume?

If so, it probably has been long forgotten — or was deleted from the record by fragrance advertisers.

Perfume, once the primary agent of female seduction, has expanded in the past decade to include men — gay and otherwise — and even pet animals.

What was once a strongly seasonal business that peaked in December is shifting into a broader year-round pattern as advertisers diversify media spending into broader sustaining and continuity plans.

Perfume marketers draw on all the mystique of associations that have been built up around the human sense of smell, the moods that may be evoked and the responses elicited. In fact, it's those results that are marketed, not the product itself.

Perfume sales in the last half of the 1970s have been uneven, with a slight decline in 1980. Paul Cohen, assistant publisher of *Product Marketing*, estimates an 11% sales increase in dollars in 1980, but a decline in unit sales. "Growth in the industry hasn't kept pace with inflation," he says.

The Fragrance Foundation's annual review of business indicates that a last minute surge of holiday business probably made 1980 a better sales year than was projected in late December.

Dollar sales for fragrances, including toilet water, cologne, bubble bath and purse atomizers topped $600 million from 1977 to 1979. According to

Drug Topics, retail dollar sales for those years were $621,140,000, $614,060,000 and $622,960,000, respectively.

Demographics for the perfume business are very broad. They start at puberty and continue on through senescence. Perfume prices range from dime store bargains to exotic essences that cost more than $100 an ounce. Within that price range, there are over 500 perfumes to intoxicate the nose and enflame the senses.

Marketing and advertising of perfumes are the most seasonal of any packaged goods business in the U.S. About 60% of media dollars invested by the industry are spent in the last quarter, mostly in December. This alone produces a sales pattern which depends on gift purchases made in the final three weeks of the year for success or failure. Some critics suggest that a more diversified advertising schedule would be healthier for the industry.

Although the perfume segment is less encumbered by planned obsolescence than other industries, new fragrances do come along that capture the public imagination. The two new hot brands at the close of 1980 were Sophia, from Squibb's Charles of the Ritz division, and Revlon's Scoundrel.

Advertising is dominated by a select group of nine brands, which together account for almost half of the industry's measured media total. Annual expenditures among this tightly competitive group range between $3 million and $5 million per brand. Base media for the industry are network television, spot televisiona and magazines. Brands aimed at small segments of the market rely heavily on spot radio for maximum selectivity.

Here's how the mass perfume marketers go after their respective segments of the business.

Chattem

Girls just entering their teens don't usually plunge into the world of perfume with Chamade, Chanel or other high priced exotic fragrances. Rather, they're looking for something more innocent and low-keyed.

One of the most successfully positioned perfumes in this entry segment of the market is Chattem's Love. This fragrance was introduced by SmithKline's Menley-James division and subsequently bought by Chattem, in Chattanooga, Tennessee.

The entry level for perfume users is about age nine, and use increases with age. Most of Love's users are clustered in the 14 to 17 age bracket. After that, they move on to more sophisticated and expensive fragrances.

Since taking over the brand from SmithKline, Chattem has increased advertising support for the fragrance line from $890,600 in 1979 to about $2 million in 1980, according to Leading National Advertisers. Most of that $2 million was spent in network television, about 75% of it in the final quarter. The brand was also placed in a select list of magazines read by teenage girls.

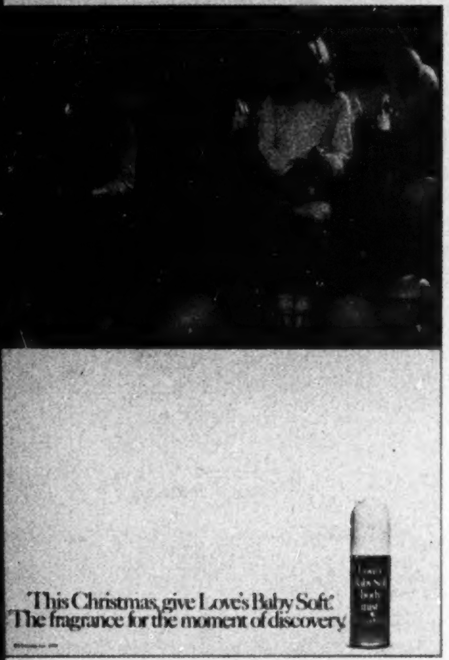
Chattem also supports the brand with an annual modelling contest. Three finalists are selected from winners from each of the 50 states, and are brought to New York and photographed. The photos are used in the ad campaign to promote the next year's contest.

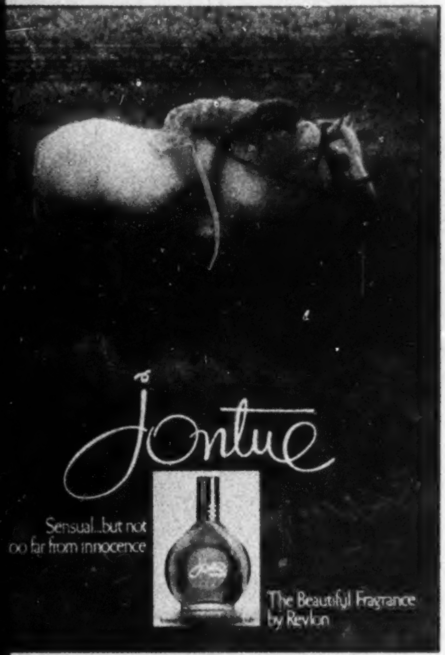
Chanel

Few marketers in any area of the package goods business have been able to develop the mystique generated by the name Chanel. Over the years its advertising has created distinctive images and attitudes, not the least of which was the brand's association with actress Catherine Deneuve. Her beauty and unorthodox life style helped maintain the brand's distinctive positioning.

Since abandoning the association

N°5
CHANEL
PERFUME


This Christmas, give Love's Baby Soft.
The fragrance for the moment of discovery.



Age segmentation is rampant in fragrance advertising. Love, top, is positioned against early to mid teens; Jontue picks up late teens.

with Deneuve, Chanel has taken a starkly different tack in the creative for its advertising. Rather than romantic fantasies, life style associations or spokesperson identification, Chanel is now stressing product registration. Chanel magazine ads depict bottles of product, again, a distinct contrast to what the competition is doing.

Chanel executives were unwilling to discuss the rationale for this campaign, but apparently are striving to gain a unique and distinctive awareness through counter-positioning. Chanel very seldom makes the expected marketing move.

How well this campaign, hardly a glamorous one, is working only Chanel knows, and right now isn't saying.

Chanel had the distinction of being the heaviest media spending brand in 1979, but in the first three quarters of 1980, was being outspent by Squibb's Enjoli.

The major media focus for Chanel in 1980 was spot television, where magazines had been dominant the year before. Network television is traditionally used heavily in the fourth quarter, while magazines and spot tv are used for sustaining purposes.

Revlon

This giant of the cosmetics world blankets most segments of the fragrance market. Currently, Revlon is supporting 10 fragrance brands with advertising budgets, and has just put its newest brand, Scoundrel, into the marketplace with a well-financed introduction.

Revlon's most heavily backed brands are Charlie and Jontou, both in the $3 million to $4 million range. Ciara and Norell have budgets in the $1 million to $2 million range. Half year expenditures for Scoundrel suggest an annual budget in the $2 million to $3 million range.

The big question for Revlon: can Scoundrel emulate the success of Charlie? Brought out in the early 1970s, Charlie was extended from fragrance into cosmetic-bath lines. A mass market fragrance, it was directed toward young, active working women. Created for the work-a-day business world, it became the number one mass market perfume.

Creative for Charlie makes its market position clear — a business-suited woman in mid-stride with no invitiation to romantic hanky-panky. It should be worn to the office to smell good. That theme is carried out in television and magazines.

The media ratio for Charlie shows 50% of the budget going into network television and 25% each into spot television and magazines.

Revlon's third quarter launch of Scoundrel was made with network and spot television. Magazines were added in the fourth quarter of 1980. Like Charlie, Scoundrel is positioned against a young audience, but with a seductive theme. In magazines, double trucks show a young woman with a mask held behind her back, opening a door for an unseen person. The name itself plays on the overtones of risky romantic adventure.

Creative for Scoundre was done inhouse; media was bought by Revlon's agency, Grey Advertising.

Apparently, Scoundrel won't compete with Revlon's other heavily advertising mass market brand, Jontou. This frangrance, Revlon says, is aimed at a younger, more romantic sensibility. Creative for this line is dreamy. "Sensual — but not too far from innocence," the copy line reads, while the art depicts a young woman astride an unsaddled white horse. Sexuality is acknowledged, but not with seduction aforethought.

The media plan and expenditure ratios for Jontou are similar to those for Charlie: 46% in network tv, 33% in spot tv and 21% in magazines.

American Cyanamid

With the launch of Cie, American Cyanamid had one of the key fragrance success of the second half of the 1970s. While other fragrance marketers were stressing mood and atmosphere, the marketers of Cie decided to tie the brand to the image of a spokeswoman personality.

The scent was launched in 1977 with actress/journalist Candice Bergen as the personality around whom the fragrance's image would be built. She has been the personification of the Cie woman ever since.

This device allowed a wide definition of target audience and life style use. Cie wasn't tied into any particular mood, but was portrayed as appropriate for any mood and any time. But this hinged on a wide acceptance of Bergen among potential users.

Network television was chosen as the primary vehicle, and has continued as such since the introduction. It takes about two thirds of the budget, with magazines and spot television dividing the remainder.

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1979 media expenditures for leading fragrances

Brand	Total	Magazines	[illegible]	Network tv	Spot tv	Network Radio
Cie	$3,409,800	$ 531,100		$2,215,500	$ 663,200	
Avon	3,246,500	111,900	217,300	1,836,800	448,500	632,000
Chanel	5,038,700	1,225,800	25,100	1,376,600	2,411,200	
Cachet	3,031,500	597,100		1,397,000	1,037,400	
Chimere	3,801,100	220,700		2,792,000	788,400	
Charlie	4,134,900	902,400		1,920,700	1,311,800	
Jontue	3,528,200	746,200		1,624,100	1,157,900	
Enjoli	4,447,500	291,400		4,111,100	45,000	

Carol Shainswit, Cie marketing director, commented "We've found that Candice, whom we consider to be the embodiment of the Cie woman, is admired by women and men for her spirit, confidence, talent, sincerity and warmth. In our new campaign, launched just before Christmas, we've opted to underline those qualities by moving away from situational vignettes to a closer, more personal statement."

The brand, she said, "is personified against today's vital, warm, self confident multi-dimensional woman."

Network television continues to be the primary medium for Cie, with reinforcement in women's magazines, *People*, plus the trade books, *Beauty Fashion, Drugstore News* and *Drug Review*.

Coty

What American Cynamid did with Cie has been greatly expanded upon by Coty with its development of Sophia last year. But where A-C didn't go so far as to name its brand Candice, Coty is playing the glamorous and dignified image of Sophia Loren for all it's worth.

Described by Coty as "this elegant, sophisticated and intensely feminine fragrance", Sophia retails for $22.50 a quarter-ounce. It is positioned against women 28 to 49, but with an appeal to women 34 and older.

Martin Gennusa, vice president at the Coty in-house agency, Ad Force, explains that Sophia will be aggressively advertised in a dollar range competitive with other major brands. This places it in the $3 million to $5 million range in 1981.

"For the introduction we used a smattering of print, but otherwise, we decided to go with television. The brand is now entirely television oriented, but we will use print in small, opportunistic ways."

In its continuity pattern, Sophia diverges from the usual fragrance advertising plan. Print is used as a sustaining medium, with television providing the pre-holiday kick. For Sophia, Coty is also using tv on a year-round basis. "We will have an additional emphasis at Christmas," Gennusa says. "But you also have to take into consideration the fact that television costs are greater in the fourth quarter," noting that fragrance advertisers usually pay through the nose for their fourth quarter splurge.

The Sophia tv schedule is part of the overall Coty buy, and is fitted into program vehicles and time slots deemed appropriate to reach the brand's target audience.

Squibb

The Charles of the Ritz division has had several successes in recent years, but none have equalled that of Enjoli, which was introduced in late 1978. In two years, the brand leaped to the number three position among mass market fragrances, a performace the division basically attributes to careful positioning.

"The era of positioning has finally come to the fragrance industry," says Debbie Storz, Enjoli product manager. Enjoli, with a $4 million plus budget, is positioned as a fragrance for working women, usually mothers and wives, age 25 and over.

New creative was introduced last fall, in which the Enjoli woman was made less strident, less alone, and more believable, Storz reports. "Although the first commercial was very successful, we decided to update it and make it more believable."

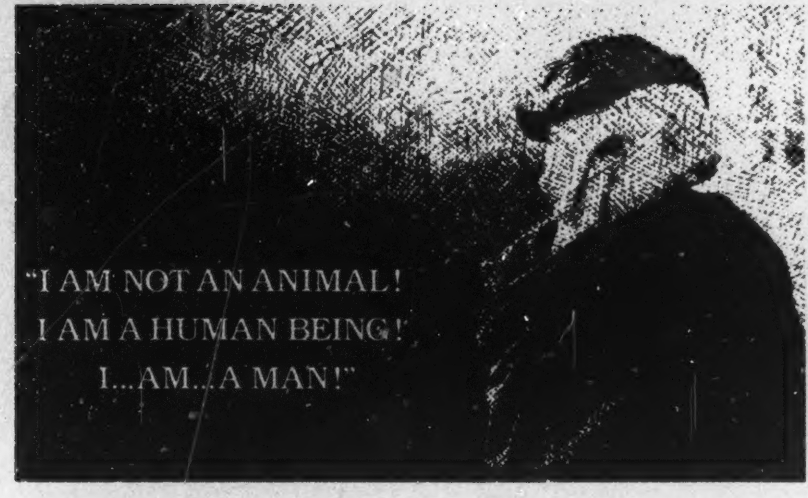
The creative, produced by Advertising to Women, is focused in network tv. The network buy, executed by Dancer Fitzgerald Sample, made Enjoli the industry spending leader in that medium. Storz says the 1979 total was in excess of the $4,111,100 reported by Leading National Advertisers.

Plans in 1981 call for continued dominance in network tv, she says, with a greater emphasis being placed on the spring season. "We're establishing a second season with the spring, with Mother's Day and with Easter. We're doing a special spring promotional package."

But Charles of the Ritz isn't stopping there. Another fragrance will be launched in August. It now carries the code name LR2. Enjoli was LR1 while in the development stage. "This new, popular priced fragrance will be dynamite," Donna Kermeen, marketing director of LR2 says. "The positioning will be different from Enjoli, so we won't be cannibalizing."

As with Enjoli, creative for the new fragrance brand is being developed by Advertising to Women, and media placement will be handled by DFS.

Fred Gardner


"I AM NOT AN ANIMAL!
I AM A HUMAN BEING!
I...AM...A MAN!"

Detail from ad for Paramount's "Elephant Man"

Brand Report 63:

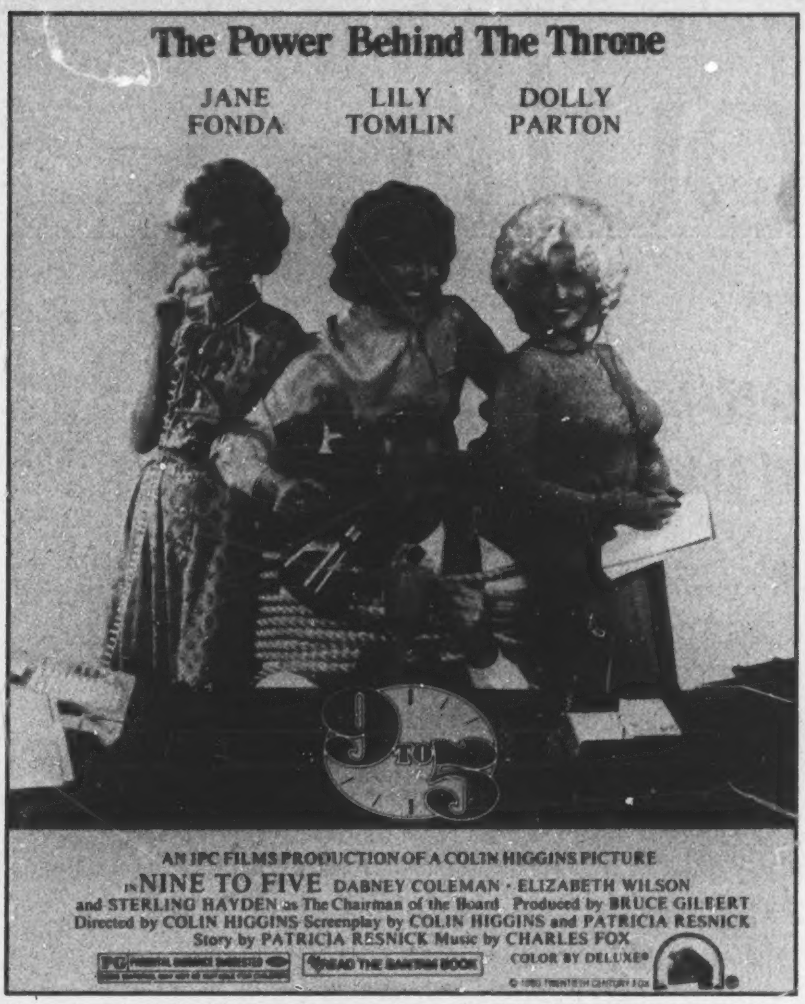
Movies

Three consecutive years of declining box office sales and the ill-fated release of a $36 million flop have Hollywood's marketing mavens expounding the virtues of cost controls and efficient media mixes. Still, ad budgets continue to soar as the debate rages over national rollouts backed by network tv versus regional releases supported by spot tv buys. In either strategy, television continues to grow as the industry's second favorite marketing medium — with newspapers still very much in command.

When director Michael Cimino's $36 million epic western "Heaven's Gate" opened in New York last fall it was characterized by critics as a long, boring, cumbersome, unintelligible example of the self-indulgence spawned by the carte blanche power of the industry's leading young directors.

With friendly notices like these, United Artists yanked the film from theaters and returned it to the cutting room even as pre-committed newspaper ads continued to run in New York dailies. The fallout at UA was swift: with the company denying any link to "Heaven's Gate", two top executives were replaced shortly after the film's release. Shock waves spread to the rest of the movie industry as major studios announced ceilings on future production costs and pledged tighter scrutiny of marketing and media plans.

The "Heaven's Gate" fiasco was merely the most glaring portent of the industry's apparently weak footing. Box office sales declined in 1980 for the third consecutive year, dropping to $2.8 billion on 1.3 million tickets sold, according to *Variety*. The average ticket price increased to $2.74 from $2.52 in 1979. While box office doubled during the 1970s, ticket prices also jumped 73%, leaving the industry with a real gain of only 23%. For 1981, the movie industry faces the


The Power Behind The Throne
JANE FONDA
LILY TOMLIN
DOLLY PARTON
9 TO 5
AN IPC FILMS PRODUCTION OF A COLIN HIGGINS PICTURE
in NINE TO FIVE DABNEY COLEMAN · ELIZABETH WILSON
and STERLING HAYDEN as The Chairman of the Board Produced by BRUCE GILBERT
Directed by COLIN HIGGINS Screenplay by COLIN HIGGINS and PATRICIA RESNICK
Story by PATRICIA RESNICK Music by CHARLES FOX
PG
READ THE BANTAM BOOK
COLOR BY DELUXE®

As part of 20th Century's year-long "political background" campaign, "9 to 5" print ads promoted the film's feminist theme.

possibility of a directors' and writers' strike this summer — labor unrest which promises to be as bitter and prolonged as the actors' strike in 1980.

Yet advertising and media directors at the major distributors have not been told to reduce advertising budgets, nor do any report procedural changes in developing, approving and implementing media strategies. While execs concede that the motion picture industry is wrought with financial waste and mismanagement, they all point to other, unnamed studios and distributors as the spendthrifts, claiming their own efforts to be tightly drawn and supported by extensive demographics and psychographics.

"There is tremendous waste in the movie business," said Ed Kalish, vice president of marketing at Paramount. "But we're not typical. We managed to have our third consecutive year of rental records and we spent less doing it. People have been predicting doom forever and it just isn't going to happen. Times change and the movies are affected, but you can't change the gregarious nature of human beings. People are not shut-ins. They want to go to the movies. Movies will prosper, there is no crunch coming. With care and judgement, we'll keep movies in business."

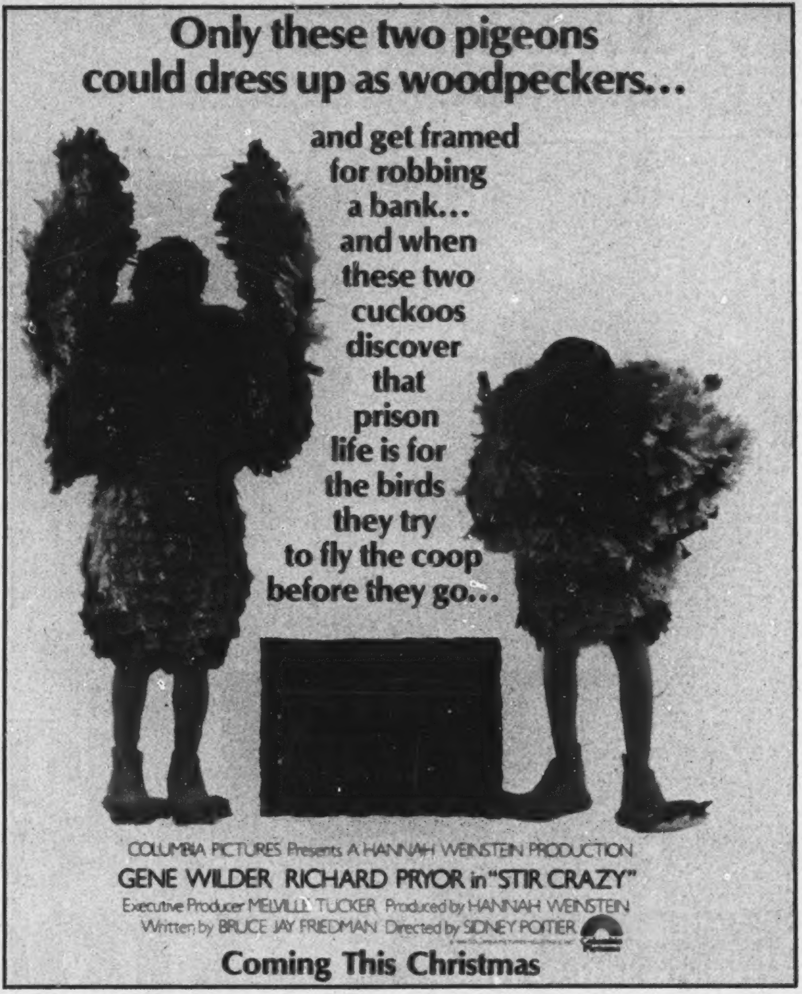
If Hollywood is tightening its money belt, it is doing so at the expense of production costs rather than media budgets. MGM Film Co. recently announced a $15 million ceiling on production budgets for any one picture made in 1981. Director Francis Ford Coppola, whose credits include "The Godfather" and "Apocalypse Now", said in February that he had double mortgaged all of his real estate and committed his entire personal wealth to meeting escalating production costs on his latest film venture, "One from the Heart."

According to a study by Theodore E. James Jr., a general partner of Montgomery Securities in San Francisco, the average advertising budget on a 1979 film was $2.5 million, with total ad expenditures ($514 million including newspapers) equaling 23% of domestic rentals, a five percent increase over 1978. In the six measured media (excluding newspapers), according to Leading National Advertisers, total advertising expenditures rose almost 24%, to $153 million from $124 million. Television was the medium registering the largest increases, with network buys up $19.1 million to $64.1 million, and spot billings reaching $80.2 million, an increase of $15.2 million over 1978.

Magazine ad expenditures declined in 1979, dropping $700,000 to $5.6 million. Newspaper supplements, which went untapped in 1978, drew $500,000 in 1979 as network radio increased $202,000 to $375,000 in 1979. Spot radio dropped more than 20% to $4.9 million in 1979. Outdoor adertising more than doubled in 1979 to $2.1 million, although LNA figures for the first six months of 1980 show a dramatic decline again in billboard ads.

Newspapers continue to dominate motion picture advertising dollars. Newspaper Advertising Bureau reports that movie advertising in daily newspapers increased 13% in 1979 to $440 million, putting total industry ad expenditures at $593 million in 1979.

"If there is a recession," said Robert Cort, the 30-year-old Wharton Business School whiz kid who left Columbia Pictures last year to become vp/advertising at 20th Century Fox, "I'm not convinced it has affected the movie industry. 1980 was not a good year, yet last Christmas broke all records. Why did that happen? Was the audience just apathetic during the year? I'm sure there is a certgain degree of public sensitivity to inflation, but there is a larger degree of sensitivity to product quality. And quite frankly, the movies last year were not all that great."


Only these two pigeons could dress up as woodpeckers...
and get framed for robbing a bank... and when these two cuckoos discover that prison life is for the birds they try to fly the coop before they go...
COLUMBIA PICTURES Presents A HANNAH WEINSTEIN PRODUCTION
GENE WILDER RICHARD PRYOR in "STIR CRAZY"
Executive Producer MELVILLE TUCKER Produced by HANNAH WEINSTEIN
Written by BRUCE JAY FRIEDMAN Directed by SIDNEY POITIER
Coming This Christmas

Columbia's "Stir Crazy" had enough of both comedy and superstars to capture 16% of record holiday box office.

The bumper Christmas was sparked by the release of several star-studded films. Columbia controlled 16% of ticket sales in December with "Stir Crazy", a comedy starring Gene Wilder and Richard Pryor. Paramount's "Popeye", with Robin (*Mork & Mindy*) Williams and Shelley Duvall, finished a close second. Other successful year-end releases included 20th Century's "Nine to Five" with Jane Fonda, Lily Tomlin and the bountiful Dolly Parton in her first feature film role; "Any Which Way You Can", a Clint Eastwood sequel to "Any Which Way But Loose", distributed by Warner Brothers; Neil Simon's "Seems Like Old Times", starring Goldie Hawn and Chevy Chase, released by Columbia; Warner Brothers' "First Family", with Bob Newhart and Gilda Radner in a critically condemned comedy; 20th Century's "A Change of Seasons", the latest vehicle for Bo Derek of "10" fame; "The Formula", starring George C. Scott and Marlon Brando, which hyped oil industry reaction to the film's fictitious contention that oil conglomerates had conspired to conceal a German formula to cheaply convert coal to fuel; and Warner's "Altered States", starring William Hurt.

Throughout the year, star vehicle movies led the field. Of 120 films surveyed, 45 featured a major star in the lead role and concentrated ad campaigns on promoting the star's appeal. Forty-one of the films were comedies, followed by 19 horror flicks, 11 biographical, true life stores and 10 musicals or music oriented features. While most films had a romantic interchange between their stars, only five pictures had love and romance as themes. Hollywood also produced only six serious, issue-oriented films in 1980. Is the serious movie moribund?

"I don't think so, not at all," said Cort of 20th Century. "We released 'Brubaker' last summer (a true-life recounting of corruption in a southern prison) knowing full well that summer audiences tend to prefer light entertainment. It was counter-programing on our part, and it worked phenomenally. The movie did $40 million at box office and $20 million in rentals. It was a very profitable film, although I think having Robert Redford in the lead role made it viable. Without Redford, I'm not sure it would have worked."

Making it work has become more competitive and exacting, leading three of six major distributors to either switch their ad agencies or replace their top marketing personnel. Cort headed up a new advertising administration at 20th Century; Sandy Reisenbach left Grey Advertising to become senior vp/advertising at Warner Brothers; and Universal City Studios switched agencies, from Wells Rich Greene to Doyle Dane Bernbach. The result at each of the distributors has been a new emphasis on either spot or network television, reflecting changing patterns in film release schedules.

Following is a review of marketing and media strategies of the five major studios during the past year.

Columbia

"We are heavy into network television because it is the most efficient way for us to reach our market," said Marvin Antonowsky, vp/advertising at Columbia. "The pictures are released nationally and network television allows us to reach our entire market. Doing the same through spot buys cost more. It's that simple."

It wasn't so simple in 1978 when Columbia dropped its network tv expenditures by almost $1 million and upped spot tv buys by $1.6 million. In total for measured media excluding newspapers, Columbia increased its ad budgets by almost $10 million from 1978 to 1979, with the largest single increase in network tv, from $4 million to $11.4 million. Spot buys, though, also increased, to $9.5 million from

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Leading motion picture media spenders in 1978-79

		Total	Magazines	Supps	Network tv	Spot tv	Network radio	Spot radio	Newspapers	Outdoor
Columbia Pictures	'79	$24,023,068	$ 983,000	—	$11,427,000	$ 8,534,000	—	$1,040,000	$ 235,000	$ 70,000
	'78	14,355,000	1,185,000	—	4,061,000	7,222,000	—	1,692,000	30,000	145,500
Walt Disney Productions	'79	16,166,000	166,000	—	9,778,000	6,206,000	—	68,000	11,000	—
	'78	12,855,000	—	—	6,512,000	6,332,000	—	11,000	—	—
American International	'79	6,686,000	338,000	—	813,000	5,272,000	—	11,000	141,000	210,000
(Filmways Inc.)	'78	1,644,000	16,000	—	797,000	822,000	—	—	—	9,000
Paramount Pictures	'79	20,744,069	912,000	[illegible]	77,586	16,877,000	—	188,000	1,187,000	1,124,020
(Gulf & Western)	'78	13,421,000	725,000	—	37,000	11,762,000	—	227,000	236,000	464,300
Universal City	'79	29,787,000	870,000	37,000	8,818,000	12,157,000	248,000	231,000	233,000	104,000
(MCA Inc.)	'78	20,898,000	2,325,000	—	7,414,000	10,565,000	99,000	446,000	—	40,000
United Artists	'79	20,080,000	446,000	—	11,529,530	7,664,000	126,000	198,000	70,000	66,000
(Transamerica Inc.)	'78	12,489,000	862,000	—	3,450,000	7,262,000	—	857,000	—	26,000
20th Century-Fox	'79	21,819,000	1,337,000	12,000	12,887,000	5,601,000	—	[illegible]	42,000	88,000
	'78	16,197,000	830,000	—	9,712,000	2,636,000	—	3,019,000	—	—
Warner Bros.	'79	19,085,000	411,000	—	11,182,000	6,853,000	—	343,000	—	290,000
(Warner Communications)	'78	18,491,000	106,000	—	12,220,000	5,850,000	—	227,000	17,000	71,000

$7.2 million. Columbia's total expenditures in 1979 (excluding newspapers) was $24 million according to LNA — a figure which Antonowsky said was very low.

Much of the budget was used to promote "Kramer vs. Kramer", the Dustin Hoffman-Meryl Streep vehicle which swept the 1979 Oscars. LNA shows total expenditures on Kramer at $4.8 million, $2 million more than Columbia spent on "The China Syndrome", the Jane Fonda-Jack Lemmon movie which questioned the safety of nuclear power plants and was released just days before the accident at Three Mile Island in 1979. Most of the ad dollars for both pictures were spent in network television.

Other major releases for Columbia included "And Justice for All", $3 million with $2.3 million in network tv; "Electric Horseman" with Robert Redford and Jane Fonda, $3.5 million almost exclusively in network television; "Wholly Moses", Richard Pryor's first release following his burn accident, at $2.6 million; "Hollywood Knights", a youth-oriented period piece, $2.4 million; "Nightwing", a horror movie, $1.7 million; "Blue Lagoon", Brooke Shields' desert island movie, $1.3 million; and "Hanover Street", "Hardcore" and "Fast Break", each spending about $1.2 million.

Paramount

"To put it simply, we use spot tv because it is more efficient than network," said Ed Kalish of Paramount. "Spot tv gets us right to the market. Movies are sold on a grass roots level, not as a national commodity. Further, spot buys let us tag on local theater information. Believe it or not, the purpose of advertising is to inform."

Paramount is the only major distributor to use 40 different ad agencies in major markets across the country. Media plans are developed centrally at the studio, then circulated to the regional agencies.

"The agencies can take the central plan and restructure it for their particular market," said Kalish. "Then they send it back to us and we approve it."

The company's commitment to spot television buying is almost exclusive. In 1978, Paramount spent $37,000 on network tv, according to Broadcast Advertising Reports. In 1979 the figure increased to $77,000. By contrast, Paramount upped its spot tv budget from $11.7 million in 1978 to $16.8 million in 1979.

> **"Movies are sold on a grass roots level. Spot tv gets right to the market."**

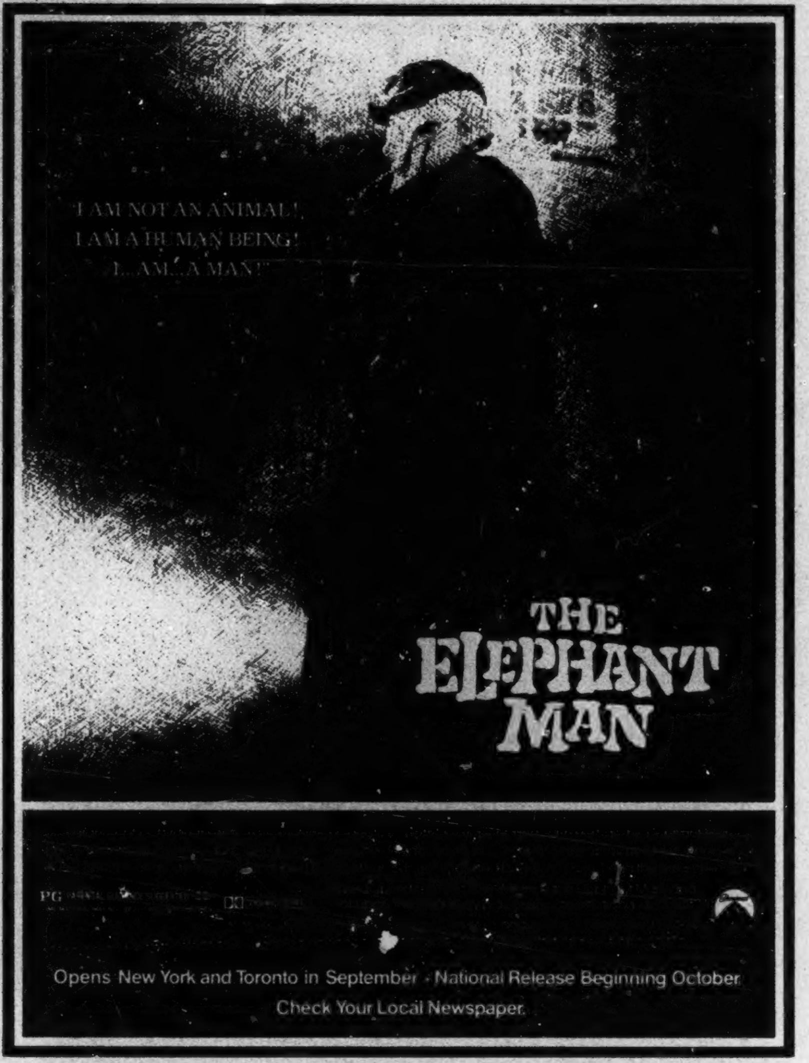
The use of spot tv corresponds with Paramount's rollout strategy. Several of the distributor's films were premiered locally, including "Urban Cowboy" (Houston), and "Popeye" (Hollywood).

"We use premieres as media events," said Kalish. "They are not just parties. We plan them only if good media coverage is guaranteed. We also have our own television news coverage, which we syndicate."

Paramount has also been the most aggressive user of magazines. In 1979, Paramount included magazines in the ad budgets on every film except "Sunburn". During the first half of 1980, the trend toward magazines continued, with Paramount spending $136,000 on "American Gigolo" alone.

"There has been a sense that magazine advertising is on the rise," said Kalish. "There has been more readership lately. But using a magazine depends heavily on the demographics and psychographics.

"Magazines can help form the early part of the media plan. We can set it up in advance and get good passalong. It's a way to keep the product in front of the public through multiple impres-


I AM NOT AN ANIMAL!
I AM A HUMAN BEING!
I...AM...A MAN!
THE ELEPHANT MAN
PG
Opens New York and Toronto in September - National Release Beginning October
Check Your Local Newspaper.

Using ads that did not exploit the subject matter of "The Elephant Man," Paramount was confident it could market the movie.

sions. We look to in-flight magazines, magazines that are sold at commuter railroad stands or sit in doctors' offices."

In 1980, Paramount released two films which capitalized on fashion trends and produced merchandising tie-ins for the distributor. "Urban Cowboy" gave us John Travolta in Western wear and mechanical bulls in honky tonk taverns; "American Gigolo" gave us Richard Gere as a male hustler in Giorgio Armani designs. Both films led to department store tie-ins and other promotions, Kalish said.

"A movie, by and large, stimulates a trend, but doesn't create it," Kalish said. "The Western wear trend was already going. Armani was already big, although there were a lot of Richard Gere look-alikes walking around after 'American Gigolo'.

Paramount also released "The Elephant Man", a black and white film about a horribly deformed man finding acceptance in society. It was a serious theme for a market that was leaning toward comedy.

"We felt if we presented the film properly, there would be no problem with having a serious theme," said Kalish. "We had to convey the dignity and quality of the film. We didn't glamorize it, we didn't horrorize it or exploit the picture.

The Paramount ad budgets on average were the lowest among the major distributors, with the company spending more than $2 million (excluding newspapers) on only one film in 1979, "Star Trek — The Movie". Other prominent releases for Paramount included: "Hurricanes", $1.4 million; "Meatballs", $1.7 million; "Starting Over", $1.9 million; "Serial", $1.3 million; and "North Dallas Forty", $1.1 million.

20th Century Fox

The new in-house advertising administration came to 20th Century just over a year ago and immediately shifted the distributor's media strategies. Network and spot radio were immediately dropped from media plans, even though 20th had spent more than $2 million in the medium in 1979. Television buys were increased one-third to $18 million, with spot buys doubling to $6 million.

> **"We needed late week tv exposure to maintain our theaters and to compete with new openings."**

"I've never been convinced of the box office response to radio," said Cort, "even though it is a very heavily targeted medium. Radio doesn't have the visual impact and registration that television and newspapers have."

Cort turned 20th's attention to television, spending as much as $2.6 million on network to promote "The Empire Strikes Back", the phenomenally successful sequel to "Star Wars". The national campaign worked for Empire, Cort said, "because there was such a tremendous pre-sell on the picture."

He used spot buys primarily as "booster advertising," running commercials late in the week or toward the end of a feature's local run.

"There are more products in the market place," Cort said. "We needed the late week tv exposure to maintain our theaters and to compete with the constant stream of new openings. If there has been a trend toward greater weight for spot tv, it has been because of this increased competition and the need for late week boosting."

Cort took a direct approach in marketing the Christmas success story, "Nine to Five". A film about three secretaries who kidnap their intolerable boss, "Nine to Five" had particular appeal to the working woman, and the politically active woman.

"We spent a year preparing for the release of 'Nine to Five'," Cort said. "We sent direct mail promotions to women's groups, secretarial groups, making them aware that the film would be coming out. It was sort of a political backgrounding. It fit perfectly. We spent $500,000 on magazines alone, using only women's books."

Other 20th releases in 1979 and 1980 included: "The Rose", $3.6 million with $3 million in tv; "Alien", the 1979 Christmas horror-sci-fi entry, $3.5 million with $2.9 million in tv; "All That Jazz", the Academy Award winning film depicting the life of Bob Fosse, $2.9 million; "Brubaker", $2.1 million with $600,000 in spot tv; "Star Wars", $1.9 million, all in network tv; "The Avalanche Express", $1.8 million all in network tv; "Breaking Away", $1.5 million with $1 million in spot tv; and "Norma Rae", $1.4 million divided between spot and network tv.

> **"Radio is generally good for reaching young people, but how extensive should it be?"**

Universal City Studios

In 1979, Universal City was the only major distributor to report a reduction in its total advertising expenditures. In 1980, the company changed ad agencies. Doyle Dane, which had worked for 20th, took the account. The result was a switch away from spot tv and back into weighted use of network television.

"It would be wrong to cite our tendency toward network tv as a trend," said Richard Uzzi of Doyle Dane Bernbach. "I wouldn't say that network buys will overcome spot buys. It depends completely on the opening pattern of the movie."

Since the agency took on the Universal City account in May 1980, all of the distributor's releases have been national with the exceptions of "Resurrection", which was handled by a special marketing group at Universal, and "Melvin and Howard", which premiered at the Film Society of America conference. Others handled by DDB, including "Flash Gordon", "Somewhere in Time", "The Nude Bomb", "The Blues Brothers", "The Island" and "The Gong Show Movie", all received national rollouts.

"If the film is going national, network television is just more efficient," Uzzi said. "We've used network radio, especially when we were handling 20th Century Fox, and it proved useful. Radio is generally a good medium for reaching young people, but the question becomes how extensive should the buy be?"

Universal City could have more opportunity to use radio, since many of its movies are comedies starring former members of the cast of NBC's *Saturday Night Live*. Since 1979, Universal City has released "Animal House", "Where the Buffalo Roam", and "1941". Other youth-oriented films included "Battlestar Galactica", "Buck Rogers", "Dracula", and "Little Miss Marker". Only three Universal City releases since 1979 have carried ad budgets of more than $2 million — below the industry average for individual releases.

These films were: "The Jerk", $2.4 million split between network and spot tv; "1941", $2.5 million primarily in network tv; and "The Legacy", $2 million with $1.3 million in spot tv. Other major ad budgets (excluding newspapers) included: "Animal House", $1.9 million with more than half in spot tv; "The Island", $1.6 million almost entirely in network buys; "The Blues Brothers", $1.4 million weighted toward network tv; "The Gong Show Movie", $1.4 million with $1.2 million in network tv; "Last Married Couple in America", 1.4 million with $1 million in network tv and $300,000 in network radio; "The Nude Bomb", $1.3 million in network tv; and "Where the Buffalo Roam", $1.2 million split between network and spot tv.

Warner Brothers

In 1979, Warner Brothers' ad expenditures increased only $500,000 over 1978 — the smallest increase of any distributor other than Universal City (which dropped its budgets $1 million). Late in 1979, however, Sandy Reisenback left Grey Advertising, where he had headed the Warner Brothers account, to become senior vp/advertising at the distributor. In the first six months of 1980, Warner appears to have turned more heavily toward network television, spending $3 million on network tv for both "Bronco Billy" and "The Shining."

"The decision to buy network or spot television is a function of our release pattern," said Perri Koggan, media manager at Warner Brothers, who came with Reisenbach from Grey. "For national releases, network buys work fine. If the film is rolling out, spot television will be used. We will test the best media mix against regional performances, using five or ten test markets. If we find that a particular media mix works in these markets, then it tells us something."

> **"We've used network radio and it's proved useful, especially for reaching young people."**

Warner also relies heavily on interpreting psychographics. "Willie Nelson (who starred in Honeysuckle Rose) appeared to be strong in the south but Gilda Radner and Bette Midler (who each had solo act movies released) were more urban; they appeal to a hipper audience in general. We apply that to the media plan," said Koggan.

"Time After Time" carried a $2.5 million ad budget for the six measured media, split evenly between network and spot tv. All other Warner releases were heavily weighted toward network tv, although "The In-Laws" carried $800,000 of a $3.5 million budget in spot tv. The rest of the budget was spent in network tv.

Other major Warner Brothers releases included: "The Main Event", $2.5 million with $2 million in network tv; "10", $2.7 million in network tv exclusively; "Bronco Billy", $3.4 million; "The Shining", $3.3 million; "Superman", $1.5 million; "Up the Academy", $1.3 million; and "Going In Style", $1.6 million in network tv only.

Craig Reiss

Decisions

SALES RESULTS
OF ADVERTISING
IN A RECESSION
NO CUT-BACK
CUT 1974
CUT 1975
1975
SALES GAINED/LOST 1972-1977

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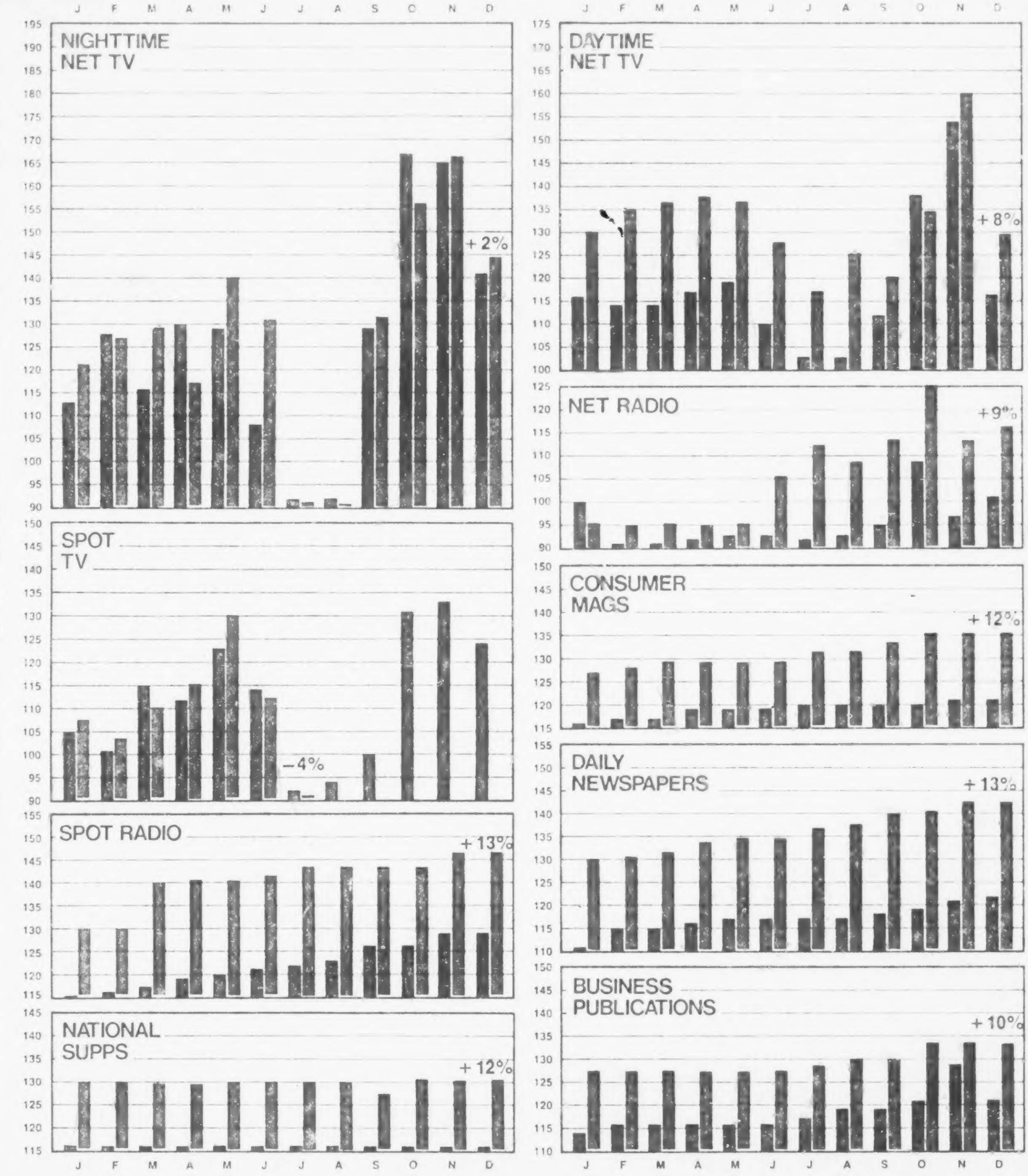
MEDIA COST INDEX

Black bars index for 1979; red bars 1980; base year 1977
Prepared by J. Walter Thompson Media Department



METHODOLOGY: The Media Cost index reflects industry reported trends extracted from available published sources. JWT Media Analysis utilized standard competitive report sources to develop comparable unit costs that reflected monthly cost trends by medium. Where industry competitive sources are unavailable, JWT sampled selected cost data from SRDS. Definition of the sources, universe, and media units used follows: *SOURCES*– **Nighttime Network TV**/BAR estimated commercial minute cost for *all* Night-time Network TV (6 PM to sign-off). **Daytime Network TV**/BAR estimated commercial minute costs for *all* Daytime Network TV (Sign-on to 6 PM). **Spot TV**/BAR CUME National Spot TV Report for estimated commercial minute costs for *all* national and regional Spot TV activity in 75 markets. **Network Radio**/BAR Network Radio Report used to estimate *all* three network (Excluding MBS) commercial minute cost. **Attention: Due to a change in BAR's source for commercial minute cost we are now using Jan. 1979 as a base for new index.** **Spot Radio**/JWT estimates based on reported SRDS cost of one minute on one station per market in the top 50 RADI markets. **Consumer Magazines**/JWT estimates based on reported SRDS cost of a P4/C for 30 national consumer magazines based on circulation. **National Supplements**

COST TRENDS
a Decisions analysis

The indexes on the page opposite and below show relative cost in each major medium for each month in 1979 (black bars) and 1980 (red bars) compared to the base year 1977.

They are complete through 1980 with the exception of spot tv, which is being updated, and may undergo revisions to more correctly reflect spot tv price trends.

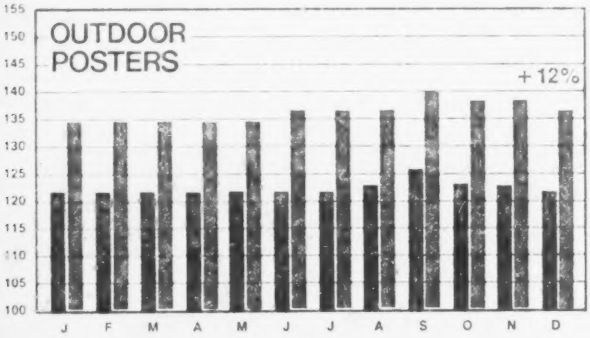
The table immediately below supplements this data with cost change for the full year 1980 compared to the full year 1979 as calculated by J. Walter Thompson. We have added in the right hand column the forecasts *Decisions* developed and published in August 1979 for what these changes would be.

Yearly average cost increases in 1980 over 1979

Media	Percent increase/ decrease	*Decisions* forecast in August 1979
Nighttime network tv	+ 2%	+15%
Daytime network tv	+12	+13
Network radio	+ 6	+10
Consumer magazines	+10	+ 9
National supplements	+11	+ 8
Business publications	+ 9	+ 9
Outdoor posters	+11	+ 8
Newspapers	+12	+ 9
Spot radio	+15	+ 9
Spot television	Revisions being made by BAR	+12

The big surprise was in nighttime network tv, which tended to level off in 1980 for the year, but showed considerable seasonal fluctuation throughout the year. Prices in the months of April and October fell considerably lower in 1980.

The pattern in network daytime tv was in marked contrast to nighttime. Prices ran ahead of the year previous in every month except October, when they were slightly below the previous year, finishing the year with a whopping 12% yearly average cost increase. Only spot radio — strongly resurgent — outpaced daytime net tv in price rise to meet the new demands.



Source: Buyers Guide to Outdoor Advertising, 1980-81. Costs of Top 50 Showing in top 50 markets.

JWT estimates based on reported SRDS cost of a P4C for 3 newspaper distributed magazines. **Daily Newspapers/** JWT estimates based on reported SRDS cost per agate line for the largest metropolitan daily in the top 50 SMSA markets. **Business Publications/**JWT estimates based on reported SRDS cost of a P4C for 46 magazines representing 42 business and professional classifications. **Posters/**IOAA reported rate card costs extracted from the Buyers Guide To Out-door Advertising for a 50-showing in the top 50 metropolitan markets as defined by Sales Management. **HOW TO READ:** Media Cost Index reflects latest available cost compared to base of average year 1977. Percent change reflects annual rate of change and is based on latest available month compared to same month previous year.

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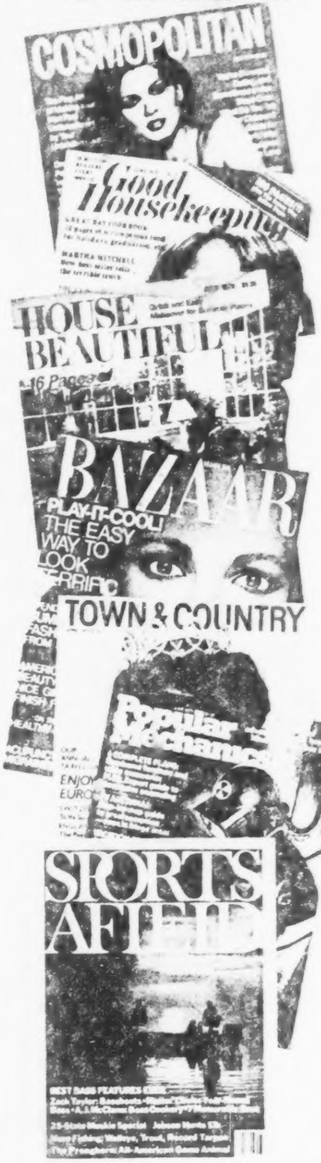

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D.C.

Census shows city growth outstripped by rural areas

For the first time since 1820, data from the U.S. Census shows that rural areas are growing at a faster rate than cities.

The trend, first noted by demographers in the mid-seventies, is confirmed in a report based on preliminary 1980 Census figures by Calvin L. Beale of the Department of Agriculture's Economics and Statistics Services.

In absolute numbers, Beale says, the country's nonmetropolitan county population increased from 54.4 million at the beginning of the 1970s to 62.8 million by 1980, a 15% jump, compared to an overall increase in metropolitan areas from 148.8 million in 1970 to 162.4 in 1980, a 9% increase.

However, Beale's report shows that the back-to-the-soil trend is even stronger than demographers suspected in some parts of the country. For instance, in the western U.S., rural population grew at a 31.8% rate during the decade, compared to urban growth of 21.2%. And in the northeast, rural areas grew at a 12.4% rate, compared to an urban population decline of 2%.

Beale publishes a report on urban and rural population trends for the Department of Agriculture each year, "based on estimates," he says. "This year I had the preliminary Census head count — the Census Bureau is still too busy to even begin analyzing the demographic results at this point."

Several important factors are contributing to the accelerated rural growth trend, he said:

"First, as an antecedent to this growth, you have to consider the massive displacement of people from rural areas that we've had. In 1940, we had 30 million people living in rural areas — today that's down to 8 million. This resulted from declining manpower needs in the basic rural industries — agriculture, mining and lumber.

"The trend began to reverse in the 1960s and 1970s, when alternative job opportunities appeared in rural areas — manufacturing industries began to decentralize away from cities, and there was growth in any number of service industries in rural areas.

"Another factor is that people began making living decisions based on non-economic values — that is, deciding to live in the country because of negative attitudes about the city, or beliefs about ecology or conservation.

Retirement is also an important factor. "In the last ten years, twice as many people moved to non-metropolitan areas as in the previous decade," Beale notes.

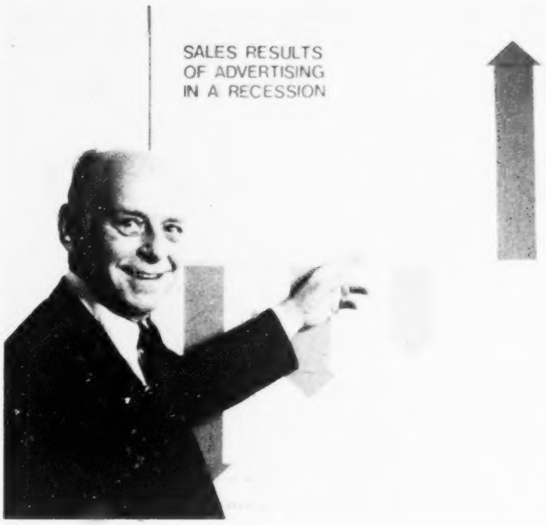
And those who do make the move find that there is a "convergence of rural and urban standards in terms of quality of life." Here, Beale notes improved quality of electrical, heating, water and telephone services, and the greater ease of travel since the development of the Interstate Highway System.

Continued on page 42

Rural and urban population changes during 1970s

State	Pct. change, 1970-1980 Metropolitan	Pct. change, 1970-1980 Non-Metropolitan
ALA.	+12.3	+12.2
ALASKA	+37.7	+28.5
ARIZ.	+54.0	+49.5
ARK.	+18.0	+18.9
CALIF.	+16.5	+35.0
COLO.	+28.8	+34.1
CONN.	− 0.6	+ 8.9
DEL.	+ 3.3	+20.9
FLA.	+39.2	+50.8
GA.	+19.8	+14.8
HAWAII	+20.9	+45.2
IDAHO	+54.0	+28.3
ILL.	+ 1.2	+ 5.2
IND.	+ 3.6	+ 7.6
IOWA	+ 4.9	+ 1.8
KAN.	+ 5.9	+ 3.8
KY.	+ 7.2	+13.3
LA.	+17.6	+11.0
ME.	+12.0	+13.6
MD.	+ 5.1	+16.9
MASS.	− 0.4	+36.3
MICH.	+ 0.6	+20.2
MINN.	+ 7.2	+ 6.4
MISS.	+23.1	+10.3
MO.	+ 0.8	+12.0
MONT.	+11.3	+13.4
NEB.	+ 8.2	+ 3.2
NEV.	+56.4	+52.8
N.H.	+28.5	+20.8
N.J.	− 0.7	+51.5
N.M.	+34.7	+23.8
N.Y.	− 5.2	+ 7.0
N.C.	+16.1	+14.0
N.D.	+19.8	+ 3.7
OHIO	− 1.0	+ 9.2
OKLA.	+19.5	+14.2
ORE.	+22.3	+29.6
PA.	− 0.5	+ 7.3
R.I.	+ 1.0	13.6
S.C.	+20.3	+16.2
S.D.	+15.6	+ 1.3
TENN.	+13.9	+18.3
TEX.	+28.8	+18.4
UTAH	+36.7	+41.7
VT.	—	+15.0
VA.	+13.3	+16.6
WASH.	+17.5	+28.3
W. VA.	+ 2.8	+15.5
WIS.	+ 2.9	+10.7
WYO.	+ 1.0	+41.1
TOTAL	**+ 9.1**	**+15.4**

Source: U.S. Department of Agriculture's Economics and Statistics Service, based on Census Bureau figures.



To cut or not to cut?

Right now is probably the best time ever for an advertiser to increase his budget.

"We have proven over and over again that advertisers who do not cut back during a recessionary period — or who actually increase their advertising dollars — move ahead not only during the recession but after it is over.

"The opportunity to gain in share of mind and market when competitors are cutting back is immense. There are still a lot of top managers who do not have the nerve to stay with their advertising programs when the economy gets iffy. But those who cut back are virtually handing the brass ring to more valiant competitors."

The man doing the talking in the *Decisions* conference room was Guest Editor Wes Rosberg, senior vp-administration, Meldrum & Fewsmith, Cleveland.

"No one wants to say we're in a recession," Wes added. "But we haven't seen much optimism about a spurt in either consumer or industrial spending. The studies that I've done show that it really pays off to advertise aggressively when competitors slow down. And it pays off most for the advertiser who — having stayed with it during a marketing slow down — steps up his advertising even further as the recession shows signs of running its course.

"Many people believe that either later this year or early next year the U.S. economy will show a dramatic rise. The question any advertiser should ask himself right now is: *Have I geared up my advertising, promotion and products to the point where I can run ahead of competition when my markets turn the corner?*"

Fortunately there are some advertisers who have apparently learned that it pays off to advertise no matter what the economic conditions. The automotive giants in Detroit currently exemplify this, and we will get into what they are doing later in this report. But first let's take a look at the Rosberg research.

Rosberg's approach on many occasions has been to ask advertisers — via an anonymous questionnaire — whether they had cut or maintained budgets during a recent recession — and also what the result was for those companies in sales, share of market and profits after the recession had ended.

Rosberg's studies were concerned with the one-year recessions of 1949, 1954, 1958, 1961, 1970 and the two-year slow-down of 1974-75. American Business Press was his partner in most of this work, and the surveys included a large number of industrial advertisers (about 70% of responses came from industrial firms). However, the questions asked were concerned with all use of media — not just business publications — and it was designed to be representative, including the very large number of relatively small-budget industrial advertisers as well as the fewer dominant users of consumer media.

Other studies confirm Rosberg

Several other researchers have developed statistics that confirm Wes Rosberg's series of probes. Two of the more significant studies were done by McGraw-Hill and Cahners.

Decisions reported on the Cahners study in February of this year. The report showed that the more spent on advertising and promotion of industrial products the greater the brand awareness — the larger the awareness the bigger the market share — and the bigger the market share the better the profits. It was not specifically related to advertising when market conditions are unfavorable, but it obviously holds implications for industrial advertisers at any time.

McGraw-Hill has conducted many studies of advertising effectiveness. The one that is most pertinent to this report is one done by the McGraw-Hill Publications Company Economics Department which — like the most recent Rosberg study — examined the sales performance of companies before, during and after the 1974-1975 recession.

Over and over again, Rosberg found that the companies that stayed with their advertising budgets made out best in the long run. The most recent study — covering the slow-

Does it pay to advertise when the people involved in making a decision to buy your products are living through hard times? With the help of Guest Editor Wesley Rosberg, senior vice president-administration, Meldrum & Fewsmith, we take a fresh look at an age-old problem. In this year of consumer confusion, how can maintenance of media budgets be justified?

down in 1974-75 — is typical. The gist of his findings is shown in the chart on the page opposite.

As the chart shows, those advertisers who did not cut back in either 1974 or 1975 experienced relatively greater sales gains in 1977 after the recession compared to the pre-recession year of 1972 than did those who did cut back. Those who cut budgets in both recession years fared the worst. Those who cut in the first of the two recession years also suffered in the long run, but not as much as those who cut back only in the second of the two recession years — and not anywhere near as much as those who cut back in both years.

Rosberg makes the point that advertisers who anticipate a recovery while a recession is on greatly reduce the effects of cutting advertising during hard times. There are quite a few advertisers in that boat currently. The lessons of the past suggest that advertisers who are still holding budgets down

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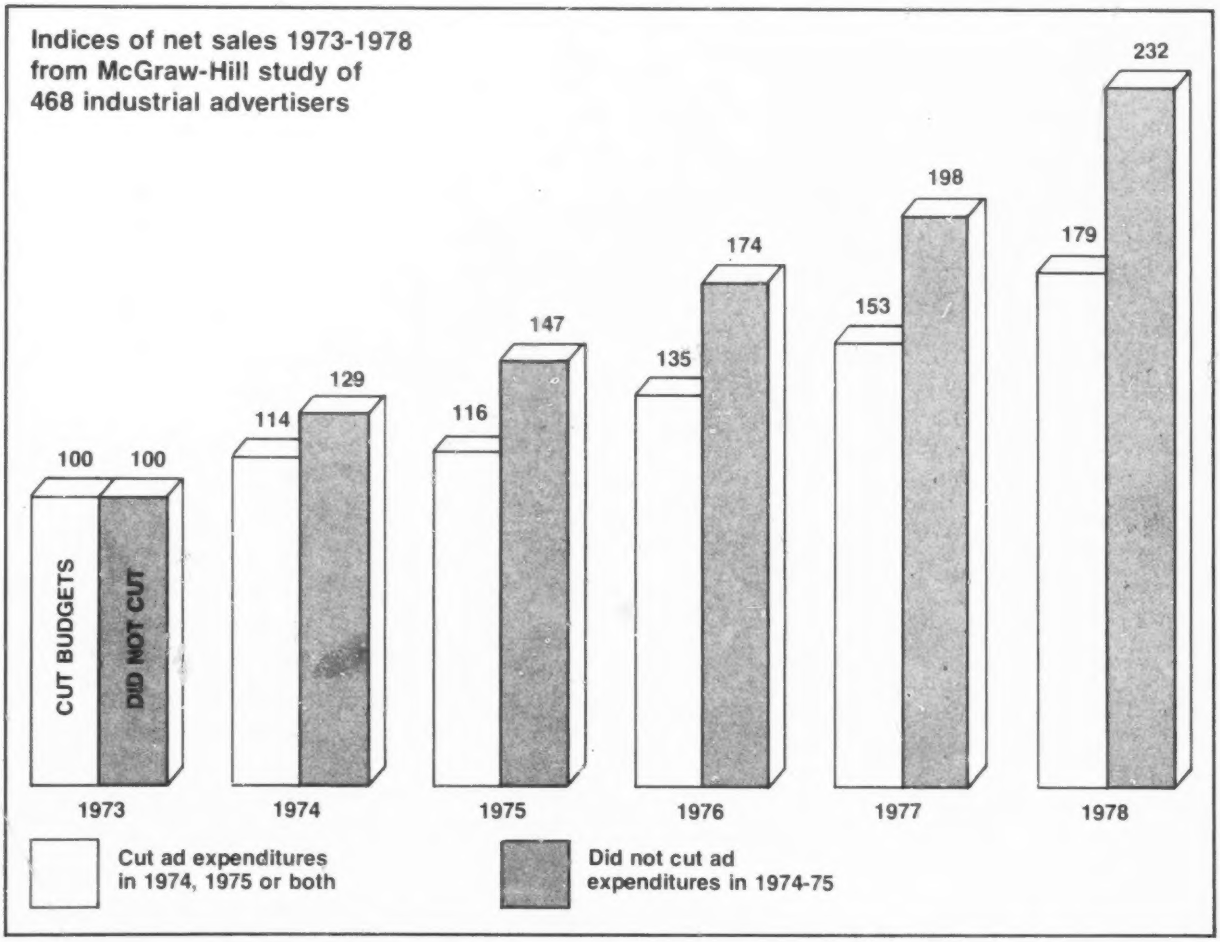

Indices of net sales 1973-1978 from McGraw-Hill study of 468 industrial advertisers

TO CUT OR NOT (from 75)

this year, as we roll into an expected recovery, would be wise to restore ad dollars as soon as possible.

The same sort of pattern also applies to profitability, according to the Rosberg survey. Not taking inflation into account, on an index basis (with 1972 as index 100), here are the index numbers for 1977:

Rosberg's rule for ad results

Sales indices	
Cut ad budgets in both 1974 and 1975	167
Cut ad budgets in only 1975	185
Cut ad budgets in only 1974	193
Did not cut ad budgets in 1974 or 1975	250
Income indices	
Cut ad budgets in both 1974 and 1975	205
Cut ad budgets in only 1975	211
Cut ad budgets in only 1974	198
Did not cut ad budgets in 1974 or 1975	323

McGraw-Hill's Compustat report

The source for McG-H's study was Standard & Poor's Compustat Service, which gathers financial data of companies filing official reports with the Securities and Exchange Commission. Of the more than 5,000 corporations in Standard & Poor's May 1979 update, 468 industrial companies provided sufficient data on net sales and advertising/promotional expenditures to tabulate a comparison.

The overall results on an index basis are shown in the chart on page 75. Sales were up 132% in 1978 compared to 1973 for those companies that did not cut ad budgets during the 1974-75 recession. This compared with a sales increase of 79% (mostly inflationary) for companies that did cut back on advertising in 1974, 1975 or both years.

McGraw-Hill was able to break the data by industry and also into durables and non-durables as groups. With the sales index for 1973 set at 100, the table below shows how types of industrial firms were doing in 1978 depending on whether or not they cut ad budgets in either or both of the recession years 1974-75 or did not cut back. Not all industries made out best by not cutting budgets, but the great majority did.

Durables	**Cut-back**	**Did not cut-back**
Lumber and wood products	148	178
Furniture and fixtures	125	149
Stone, clay and glass	155	222
Primary metal products	184	208
Fabricated metal products	156	195
Machinery Exclud. electric	204	397
Electrical and Electrical Equip.	169	235
Transportation equipment	202	181
Instruments	265	252
Miscellaneous	169	191
Average	183	263

Non-durables	**Cut-back**	**Did not cut-back**
Food and kindred products	193	186
Tobacco	193	215
Apparel	145	163
Paper and allied products	198	197
Printing and publishing	187	192
Chemicals and allied products	160	215
Petroleum products	227	255
Rubber	198	177
Leather	151	169
Average	175	196

Not much has been done to show the effects of maintaining vs. cutting ad budgets for consumer products during difficult marketing periods. Attempts to do this have often run into the inability of analysts to find any *quid pro quo* relationship between advertising and sales. They wind up asking themselves: Which was causal — advertising or sales?

A valiant attempt was made many years ago to solve this riddle by a researcher whose source was annual reports. He reasoned that results should be judged in terms of the cost of selling — the percent of retail sales chargeable to all marketing costs. This was compared with the amount of the sales job handed to advertising — the percent of sales cost that was advertising.

The problem with this research was that most annual reports do not furnish fine enough data on advertising and sales. Annual reports generally lump together things like general and sales expense. Few break out advertising separately. Perhaps an investigation of this kind could be done today based on the SEC data that is now available.

But we do have some current examples of advertisers who have stayed with sizeable ad budgets in spite of other marketing problems.

New thinking in Detroit

The most heartening example comes from Detroit, where the embattled domestic car makers have apparently come to rely on advertising to build sales — not just reinforce them. Admittedly, they guessed wrong about the kind of car that Americans want most these days, but now they are catching up with small, fuel-efficient models that can compete with the imports. And in spite of the difficult marketing conditions, they are advertising and promoting them aggressively.

One could argue this shows that automakers are running scared, and that they know they have to keep budgets up in order to prevent the imports from making further inroads in their markets.

But the fact is that Detroit increased ad budgets in 1979 and 1980 — and is going ahead with giant introductory campaigns this year.

Ford Motor Company increased major media dollars for Ford cars and trucks from $106 million in 1977 to $163 million in '78, and to $175 million in '79. We asked R.J. Gillooly, Ford car advertising manager, why.

"There are two ways you can go," Gillooly told us. "You can pull in your horns or you can keep on spending. The tendency used to be to pull back during hard times on the assumption that advertising was not the kind of thing that could turn around a sick economy.

"Now the attitude is that it won't cure a recession, but:

"1. The individual manufacturer's share is all important, and you have to keep up your share as industry volume declines.

"2. If everyone pulls out, industry volume isn't going to get any better. We have to keep new car excitement going out there in the marketplace.

"3. In recent years, everybody doesn't get hurt the same way in a slow economy. The import advertisers are not cutting back. With the imports moving ahead, it was just good strategy for domestic advertisers to keep up the effort.

"Ford will keep its budgets up in 1981. We have maintained and modestly increased our budgets. On April 9th we will make a strong launch of new models. Advertising will begin about 10 days before that."

In late February, 20,000 Ford division dealers and their salespersons met in 38 cities to see the 1982 model EXP and review mid-year marketing plans. This was dramatized via three live satellite transmissions across the country to hotel conference rooms. Top Ford marketing executives will appear on 14 by 16 foot screens to make a presentation arranged by Spotlight Presents.

New product news continues to be a powerful advertising lode for automotives. Ford built major promotions around its Escort, and Mercury around the Lynx. GM plugged its "J" car and Chrysler its "K" cars.

Chevrolet ad dollars rose from $112 million in 1976 to $131 million in '77 to $151 million in '78 to $168 million in '79. Chrysler brands cut back in 1979, but Chrysler/Dodge/Plymouth cars were supported in that year with $128 million major media dollars.

In the first nine months of 1980 car importers heated up the market with an 11% increase in ad dollars to $263 million. Added to that was an increase in import dealer dollars of 15% to $30 million. The import increase was poured into spot tv in East and West Coast markets, and into magazines with appropriate target audiences.

The domestic car manufacturers had to respond, with nine-month budget increases of an equal amount to $355 million. Their big increase was in network tv and supps. But with sales lagging at retail, domestic car dealers reduced nine-month expenditures by 28% to $83 million.

The domestic car manufacturers' new attitude (advertise when times get tough) is essential to their survival in East and West Coast markets where they are being outmaneuvered by the imports.

Other lively markets

The automotive field is not the only one that has been kept lively by competition. The inroads made by the imported cars may turn out to be a blessing in disguise in that they have forced Detroit to maintain ad budgets and other promotional activity — like rebate wars.

The airlines, during the recent recession, did more advertising than ever before. Deregulation happened to come along at the same time and stimulated heavily-advertised price wars. United (UAL)'s major media use jumped from $23 million in 1976 to $37 million in 1979 — Delta's during the same period from $20 million to $30 million — American from $22 million to $29 million — Eastern from $21 million to $29 million.

Commented Rick Douglas, advertising manager, British Airways, when he was our September Guest Editor: "Like most airlines British Airways hopes to make it through the economic downturn relatively intact with staff and a fleet of new airplanes we are taking delivery on, with all the confidence of a refrigerator salesman in Helsinki. We, like him, know that there surely exist those many prospects out there clutching cold cash in icy glove."

The cigarette manufacturers, in spite of anti-smoking lobbying, have held volume up. They've brought out new products, fought for market share, and piped in ad dollars. They've been too busy saving their business to bother with anything as temporary as a recession. (Bob Sidur of McGraw-Hill points out there have been 28 recessions since 1854 — one every four years — "apparently a way of life in the United States.")

Winston cigarettes' use of major media in 1976 was $34 million; in 1979 $59 million. In the same period Kent went from $26 million to $55; Merit from $39 million to $52 million; Salem from $27 million to $48 million; Vantage from $23 million to $46 million; Marlboro from $31 million to $45 million.

The beer business cooled off for some in the 1970's. But not at Miller and Anheuser Busch. Miller's major media expenditures in millions rose from $28 in 1976 to $32 in '77 to $50 in '78 to $59 in '79. Schlitz didn't keep up — with budget at $30 million in 1976 (more than Miller at that time) creeping up to $44 million in 1979 (by that time about 25% less than Miller).

The marketers who think more about share of market than short-term economics have made out best over and over again.

What wise men say

A search of the literature on advertising under difficult marketing conditions yields some carefully stated conclusions by men who have lived through recessions. Here are a few:

The late Arthur C. Nielsen: "The manufacturer who maintains his normal level of promotion when his competitors have reduced their's soon finds that his expenditures represent a higher percentage of the total expended by the group. Our records show clearly that there is no surer way to gain an increase in competitive share of market."

Charles Brower, former president of BBDO: "There are few things as detrimental as a lapse in advertising. It costs much more to get up advertising momentum than it costs to keep it going."

Paul Harper, Needham, Harper & Steers (before the ANA in 1979): "Many marketers during the 1974 recession cut their r&d costs, cut advertising across the board, substituted heavy dealing for media expenditures, deferred the launching of innovative products, preferring to ride it out with what they had. I can tell you from first-hand observation that the marketers who responded this way in the last recession are still paying for it. We found that in a heavily advertised category a substantial cut in the share of advertising in that category, if extended for more than 15 months, could predictably result in a dramatic loss of market share, which was then very expensive to win back."

F. Kent Mitchel, General Foods (in 1974): "At the top of almost every marketing manager's list is protecting his franchises, given the current state of our economy. In most businesses the bulk of the volume — often 70% or more — is done with 30% of customers. The marketer knows that he must protect this with care no matter what the cost. For it will be much cheaper to maintain than to try to rebuild later — indeed, rebuilding may be impossible."

Charles Mill, president, American Business Press: "Whether you look at the experience of individual companies or of all the companies reporting to us (in the Rosberg reports) after five recessions, you get the same answer: The present period of uncertainty in the nation's economy could mislead advertisers into false 'saving' by cutting back on advertising."

Dick Ostheimer, Babson College, Wellesley, Mass. (former research director of Time, Inc., writing in the December 1980 Journal of Advertising Research): "That the amount spent on magazine advertising is sensitive to business cycles is generally well appreciated. Financial analysts, for example, label periodical publishers' stocks as 'cyclical,' and it is a familiar and widespread practice to determine advertising appropriations on the basis of current or anticipated sales.

"Although there may be some efforts at counterspending, when the outlook is weak more often than not budgets are cut. . . .

"Magazine advertising has generally conformed to the economy's business cycles, typically coinciding at the turning points or, with one exception, never more than one quarter ahead or behind. Its contractions, consequently, have lasted about as long as those of general business, ranging from three-quarters of a year to a little over a year. If there is any tendency to lag or lead, it is to lag at the upturn. This behavior accords with what might be expected to the extent that advertising budgets are set in part with an eye to sales during the past month or the past quarter . . .

"The amount spent on advertising in magazines is clearly related to the state of the economy. Magazine advertising experienced each of the general economic recessions of the postwar years, exhibiting a wide peak-to-trough fluctuation and some tendency to lag in cyclical upturns. As such it resembles some other economic series involving outlays that are deemed postponable."

Conclusions

What do we conclude as a result of the conversation initiated by Guest Editor Wes Rosberg?

(1) The research done by Rosberg and by McGraw-Hill and Cahners (mostly in the industrial advertising field) is convincing. Industrial advertisers whose budgeting is not related to economic slow-downs make out best in the long run.

(2) Consumer advertisers, to an ever increasing extent, agree with this theory, but broad research into the behavior and results achieved by consumer products advertisers is strangely lacking. Where consumer advertisers are concerned, we have to rely on the wisdom of key spokesmen for consumer advertisers — and on isolated case histories. Certainly, a major inquiry into cause-and-results in consumer advertising during recessionary periods would be beneficial.

(3) During the most recent recession, several consumer advertising categories maintained advertising expenditures in spite of economic portents. The reason, however, in the most obvious cases was because of immediate rather than long-term considerations: import competition to Detroit-made cars; smoke blown in the fact of cigarette advertisers by health considerations; inter-airline competition sparked by deregulation.

(4) Recessions are short-term affairs in the U.S. market. Advertising that creates awareness, brand preference and a desire to own is a long-term love affair. Those competitive marketers who concentrate more on long-term share of market than on short-term economics make out best. ■

1976–1980
MONEY
TEEN POPULATION
1976
1977
1978
1979
1980

Marketing paradox:

Fewer teens, more spending

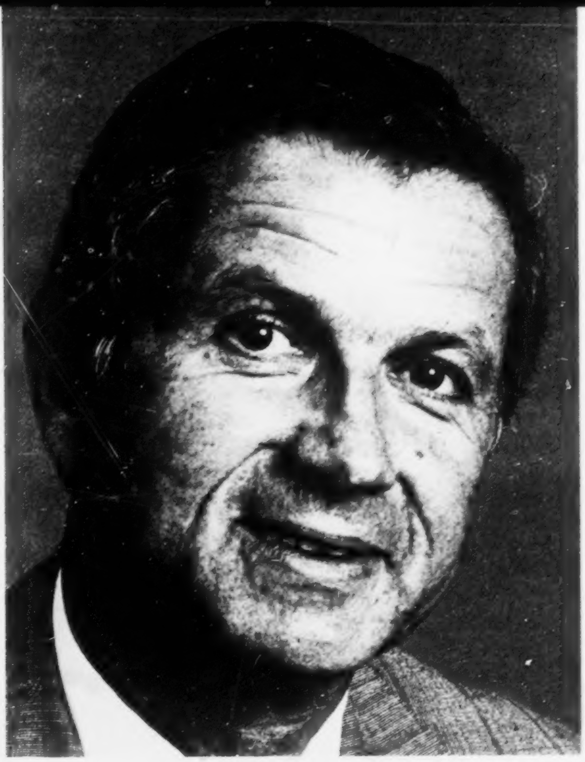
Importance of the teen market as an influence on family spending is growing in leaps and bounds. Their ranks are thinning, but their pocketbooks are not.

It's a paradox: As the teen population continues to shrink from year to year, the indications are that disposable income among teens as a whole will keep growing.

Here are the highlights of the habits, character, trends, expenditures, culture and other factors gathered in a three-month survey of the teenage population and the marketing efforts to reach them.

- Teenagers are a fickle lot, but they have an incredible influence on trends in clothing, entertainment, life styles and food tastes.
- Older teens are a reliable barometer for new products and services.
- Teens have become more and more important in grocery and other family shopping in view of the fact that well over 50% of married women work outside the home. The working woman's teenage daughter fills in as surrogate shopper.
- Because of inflation, many heads of household can't afford to provide their teenagers with as much allowance as they've been accustomed to. Hence there's been a tremendous increase in after-school and Saturday employment among teenagers who are able to get employment permits.
- A notable result of added teen income: growing tendency to buy more durable and high-priced products, from radios to designer jeans, cosmetics and footwear.
- As teens get into the routine of earning much of their own way, their contribution becomes an integral part of the family's economy — and of greater influence on household decisions as well.
- Smaller households (i.e. fewer children) tend to favor the economic position of those fewer children — including teenagers.
- As members of a highly consumption oriented society, teenagers have become increasingly aware of new products and brands. They are natural "triers."
- The teenagers' allotment of earnings are largely disposable. They don't have to pay for shelter, food at home or other expenses of maintaining a household.
- Further education interests teens as a means of continuing a materialistic lifestyle.

"Too many people are preparing for jobs that don't exist, while not enough young people are preparing for jobs that do"
E. J. Clark, manager, Educational Commun. Prog.



"Today's teenager is considerably more mature and selective in choice of new products; quite appreciative of values; more ambitious, more materialistic in outlook and drive"
George Fabian, senior vp-SSC&B

- Teenagers are inclined to save more of their money, but not for a rainy day. Rather it's for vacations and the more expensive products — cars, stereo equipment, etc. There's no slow-down in their car buying, including vans, but they're driving less because of the zooming cost of gas.
- There's a big difference in interests between the 12-15 and 16-19 brackets. But teenagers as a whole do have many common consuming and cultural aims.
- A problem among the sellers of teen books is the growing notion among some agency planners and brand managers that older teens read adult magazines. Some have claimed that using teen books can result in duplication.
- Trends in clothing and lifestyles among girls, according to economists and other observers of the American scene, indicate teenage girls are trying harder and harder to equate themselves with males.

Teen population and disposable income

	13-19 Population	Disposable income
1976	29,622,000	$26,100,000,000
1977	29,349,000	28,700,000,000
1978	28,863,000	32,200,000,000
1979	28,183,000	36,000,000,000
1980	27,446,000	39,100,000,000

Sources: U.S. Census Bureau; Annual Rand Reports 1976-80.
Note: In 1980 teen population was 7.3% under 1976, but comparative disposable income was up 49.8%.

Views on the teen market

Following are the responses of media buyers on the teen markets they seek.

Bob Schreiber, vp-director of marketing and advertising for Maybelline, a predominant cosmetics advertiser in teen magazines: "We start off with the decision to advertise extensively in teen publications because of the number of products credited to and designed for the teenage user. This doesn't mean we aren't at the same time directing equal effort at the 18 to 49 users.

"We recognize that a product focused on the teen market through advertising can have a marked influence on the market as a whole, as happened with flavored lip glosses.

"Very important in our planning and expenditures is the changing volume of cosmetic spending by the consumer population. We watch the marketing of other cosmetic companies — for example, the skin line of Noxell and its Cover Girl advertising place-

TEENS (from 77)

ment and sales volume compared to ours. We study the consumption pattern of the various age segments, including the teenagers.

"Even though teenagers may also be reading the bigger circulation glamour and fashion books, our concerted readership goal among teenagers is to reach them in the five teen books.

"Our ages of bracketing, by magazine, is *Seventeen*, 15-19; *Coed*, 14-17; *Teen*, 14-17; *Sixteen*, 14-16; *Teen Beat*, 12-14.

"We especially like the magazines that are loaded with stories, comment and reviews about movies and rock 'n roll personalities.

"So far the cosmetic business is continuing quite strong in the teen field. It isn't shrinking with the shrinkage in female teen population."

Dawn Sibley, senior vp-director of media, Compton: "The fact that age group magazine readers cross over into another age group — like the teens into adult magazines — is of little consequence.

Seventeen and eighteen-year-old girls read *Glamour*, *Mademoiselle*, *Cosmopolitan*; seventeen and eighteen-year-old boys read *Playboy* and *Sports Illustrated*. But presumably their real reading is the teenage magazines. It might be added that a lot of the young women are also readers of the *Ladies Home Journal* and *Good Housekeeping*. However, the efficient buyer carefully determines which class of publications will deliver the best sales for a product."

George Fabian, senior vp-director of research, SSC&B: "The more recent teen generations have become increasingly conservative, maybe due to the fact they've run out of causes to fight for.

"Because of this lessened involvement the age gap appears to have narrowed. With fewer fads of the activist kind, they have become more materialistic and ambitious and pursue more concrete goals.

"Out of all this has come a tendency to appreciate product value. They are more discriminating in their choices of products. They show a keener appreciation of the value of the dollar.

"In these days of inflation money doesn't come so easy from the parents. They've had to learn to earn their own money. They serve a contributory role as purchasers of groceries and other kinds of products when the mother as well as the father is working."

What do teens spend their money on?

According to surveys conducted by *Coed*, *Seventeen* and such independent panels as the Rand Youth Poll and National Family Opinion, both female and male teenagers spend most of their money on clothes, records and hi-fi equipment, entertainment and travel. With women, cosmetics top the list. Clothes in this era of designer jeans come next followed by health products and footwear.

With young men, the most money goes for (1) sporting goods, (2) cameras, (3) records and stereo equipment, bicycles, (4) athletic shoes and jeans, hobby type products, musical instruments and electronic games.

The Columbia Records and Tape Club has the field to itself in the amount spent in teen books annually (double trucks exclusively).

Perhaps there's no category of advertiser who causes the slick teen books as much mouth-watering as food and cooking utensils.

That's one of the reasons why the magazines are putting so much stress in their promotion of the working mothers syndrome. Repeated pitch about teenage grocery shopping is starting to garner results on the advertising revenue side.

The biggest of the foods regularly using the teenage magazines is Kraft, which goes for double trucks in *Seventeen*, *Coed* and *Teen*, with the ads emphasizing recipies containing Kraft products. Tied in with this campaign is the stated recognition by Kraft that "teenagers have considerable influence on the family's food purchases and are involved in planning and preparing a significant number of family meals," says Ruth Ann Johnson, manager of Kraft's Home Economics Education Program. "This helps young people achieve good nutrition and balanced meals, along with proper shop-

Continued on page 116

Top ten teen tv shows

Female teens

Rank	Program	Average audience
1	Happy Days	2,780,000
2	Eight Is Enough	2,480,000
3	Love Boat	2,440,000
4	Laverne & Shirley	2,400,000
5	Fantasy Island	2,380,000
6	Dukes Of Hazzard	2,200,000
7	Dallas	2,140,000
8	Diff'rent Strokes	2,110,000
9	Little House On The Prairie	2,100,000
10	Mork & Mindy	1,960,000

Total teens

Rank	Program	Average audience
1	Happy Days	4,900,000
2	Chips	4,460,000
3	Diff'rent Strokes	4,370,000
4	Popeye Valentine Special	4,210,000
5	Laverne & Shirley	4,000,000
6	Dukes Of Hazzard	3,990,000
7	M*A*S*H	3,740,000
8	Love Boat	3,730,000
9	Enos	3,720,000
10	Three's Company	3,610,000

Source: NTI February 1981

TEENS (from 78)

ping skills now and for the future," she adds.

Likewise tied-in with the ad campaign is an educational kit on "Food Buymanship" provided to home economics teachers to distribute to teenagers in the schools.

The proof of the pudding in this ad campaign is an unplanned for response. The campaign evoked from teenagers a "Dear Abby" relationship, with letters pouring in on Ms. Johnson. The letters reveal that new demands are being put on teenagers — particularly in cases where mothers are working, and daughters are required not only to do the shopping but look after younger siblings.

Other food accounts in the teen books include Wyler's, Dole, Betty Crocker, Chicken of the Sea, Lea & Perrin, Rice-a-Roni, Kikkoman Soy Sauce, Blue Diamond Almonds, and cookware products such as Peer Pressure Cooker and Tupperware.

Incidentally, all the slick teen books regularly include a feature on food recipes.

Seventeen in its December issue doubled up on food with a two-pager on recipes and a two-page cooking contest. *Coed* the following month had three food features, while *Young Miss* in its full-size four-color format bow included a section on pizza recipes.

Manufacturers of soft drinks and fast food franchisors are not given to advertising in teen books, even though the youngsters are high on the customer list in either industry.

When ad solicitors for the teen books have gone after the drink giants' home offices, they've been told that it's more important that their merchandising money be put on the large household sized bottles — and that "the teenagers are covered by network tv and radio, anyway."

The leading fast food franchisors' response: all advertising strategy is left to the franchisees. Nevertheless, one of the four slick teen books just made an updated pitch to Pepsicola.

Teen population will continue to shrink

Despite the current shrinking of the teenage population, the next five years will produce a large teen crop. There will be more young men than young women. Here's how Census projectionists have the teenagers (13-19) staked out to 1985 inclusive:

	Females	Males	Total teens
1981	13,306,000	13,759,000	27,065,000
1982	12,990,000	13,433,000	26,423,000
1983	12,748,000	13,184,000	25,932,000
1984	12,568,000	13,014,000	25,582,000
1985	12,322,000	12,768,000	25,090,000
Total	**63,934,000**	**66,158,000**	**130,092,000**

Teen use of tv and radio

In a recent analysis of teen viewing of tv by dayparts and the full week Nielsen found that compared to the year before:

- There was a normal bounce of set attention for both teen sexes. The fluctuations in the amount of viewing was about the same.
- Distribution of viewing showed no difference in seasonal patterns for either men or women.
- In primetime Monday through Sunday the males registered 8 hours and 51 minutes on the average and the females 7 hours and 57 minutes. Each was up 30 minutes over the previous year.
- In a 24-hour span, the males during the specified week put in a total of 23 hours and 57 minutes and the opposite sex 22 hours and 32 minutes. The males viewed an hour and a half more.
- For the 4:30-7:30 stretch, men averaged 8 hours and 51 minutes and the women 7 hours and 37 minutes.
- Of consequence to advertisers and agencies may be this finding on teenagers: the peaks of viewing now come in February and July. Obvious reason for the July ranking is there's no school in July. The reason for the February ranking is anyone's guess.

As for radio listening, it's no bell-ringing revelation that teens habits have from year to year been zooming in the direction of fm stations. Listening as a whole, according to SRI, has held its own across the board and is even better on a seasonal basis.

The latest measurement of radio shows that 73.4% of all teen listening is on the fm dial. Compared to total radio immersion am has an index on a scale of 100 while the fm index is 128.

Obviously of major significance in the area of teen radio is that 99.9% of the teens tune into radio during the week, which gives that age group the highest cume rating by far over any other age/sex segment in media.

The continuing growth of the teen audience on fm has created a puzzling situation for many broadcasters who want to sell advertisers on the proposition that this type of fare reaches up and over into the 20's age bracket. The advertiser, in aiming at the "youth market," should logically extend age focus as high as the 24-25-year-olds, broadcasters claim.

It is their contention that a large percentage of those in the lower 20's, notably college students, may not fancy being referred to as part of the younger flock, but they still prefer the same kind of music on the air and on records as the 17-, 18-, and 19-year-olds.

These broadcasters further suggest that agency planners and time buyers stop treating the formalized age breaks from the syndicated services as gospel and do a little inquiring of their own into contemporary facts.

They say they're waiting to see, if and when Nielsen enters the field of radio research, it will restructure some of the old age demarcations.

Armed services and teen books

The U.S. Army's core marketing targets are both sexes between the ages of 16-21, with special interest in the

17-19-year-olds. But the only magazines in the teen area that the services use to any extent are *Scholastic Group* and *Seventeen*. Attached to the Scholastic layout is an Army response card.

The Air Force and the National Guard, with like recruiting intent, also advertise in *Scholastic Group*, to reach high school graduates.

Altogether the U.S. Army spends $29 million for recruiting in media, with the Air Force spending another $5 million and the ROTC between one and two million.

At a meeting with the U.S Army account group at N W Ayer International's headquarters in New York we were told that the Army's budget breakout for media in 1981-82 is 45% tv, 20% radio, 20% magazines, 5% newspapers and 10% direct mail.

The Army magazine list, described by an Ayer account executive at the meeting as "quite broad in scope," further consists of *Glamour* (obviously aimed at potential female recruits), *Tv Guide*, *Newsweek* and *Time* (the last two for parental support), *Ebony*, *Jet*, *Essence*, *Black Enterprise* (the last also for parental support).

Tv network participations are in network daytime and sports, while for radio the campaign consists of three on-line networks and some syndication.

Of the $5.8 million going for magazines, the teen books should garner over $100,000.

The zooming cost of tv is credited with skinning materially the shares for other media.

Corporate teenager influencing

Several top rank corporations are regularly engaged in campaigns of corporate image molding, career guidance and what they generally describe as education programs for secondary school students, but the only one of them consistently advertising in teen books for those ends is General Electric.

Other corporations with such endeavors are International Paper, AT&T, IBM and McDonalds.

GE has participated in teen books with at least nine, four-color pages a year in *Scholastic Group* and random pages in *Seventeen*.

GE summed up the purposes of its own "education program" in a phone interview as follows:

- To address youthful preconceptions of corporate motives and attitudes toward the body public, and hostile views they might have picked up from their parents.
- To direct corporate messages to youth to help them identify the valuable talents they have and suggest a career direction, with a view of framing their studies intelligently, as graphically shown in the GE teen book advertising.
- To steer youngsters in the direction of becoming engineers and technicians, which talents might be looked upon as useful in the GE organization. And, if they turn to other careers, maintain a positive attitude towards GE in years to come as consumers, potential GE stockholders, as residents in towns with a GE plant.

American corporations may be borrowing a leaf from the Japanese industrialists, who begin seeking potential talent relatively early, watch out for the development of such talents for eventual plant recruitment and assurance of a lifetime career in the company.

In going through the teen magazines as part of our examination of the teen market we noticed that the models in the ads for the high priced jeans were invariably in the late teens, if not older.

We felt that this might be discriminatory toward the girls in the other end of the teen spectrum.

So we checked with the people in marketing who ought to know and we found that the 13-14-15-year old girls have become as inclined to spend as their older sisters on new cosmetic and hair treatment products.

In reaching the age of awareness, boys also become clothes conscious and, if their peers are wearing them, they join the market for even a $40-$50 pair of designer jeans.

In sum, the 13-15 segment of teens today is a far more resourceful and work-disposed breed than it was a decade ago. The group can be counted on to earn the money for what they really crave, even if it means shoveling the snow from the garage path or other tough chores.

Ben Bodec

NEWSMAKERS

(from 28)

Richard L. Brett, the marketing manager at Scripto, Inc. who was credited with the successful introduction last year of the company's first erasable pen, is promoted to vp-marketing at Scripto. Brett replaces **Michael A. Graziano,** who resigned in December 1980 as vp-sales and marketing. The 33-year-old Brett, who joined Scripto in 1972, will develop marketing programs for Scripto pens, mechanical pencils, leads, erasers and other accessory products. He will also manage the company's national advertising budget.

The Dancer Fitzgerald Sample/Wegener Agricultural Group names **Paul Richey** as associate media director to supervise media on the Ciba-Geigy Agricultural Division account. Richey most recently served as vp-media director for Keenan & McLaughlin and previously spent 13 years with McCaffrey & McCall.

Gerard Duffy joins the national broadcast unit at Foote, Cone & Belding as broadcast supervisor. In his new position, Duffy will also work on special cable projects. Duffy leaves Case & McGrath, where he was director of broadcast media and programing. He has also worked with William Esty and Dancer-Fitzgerald-Sample.

Jennifer J. Kermath leaves the Aramis division of Estee Lauder to become director of marketing for the fragrance division at Chanel, Inc. A promotional director for Aramis, Kermath was also vp at Haute Route, a company specializing in men's fragrances and treatment products.

John G. Adams becomes media director at Tycer-Fultz-Bellack Ltd., a Palo Alto-based technology oriented agency. Adams leaves Cunningham & Walsh-San Francisco, where as media supervisor he handled media planning on the Qantas Airways, Pentax LX Camera, Barclays Travelers Cheques and Royal Viking Line accounts, among others. He has also been a media planner for Grey Advertising in New York.

Brand Report 63:

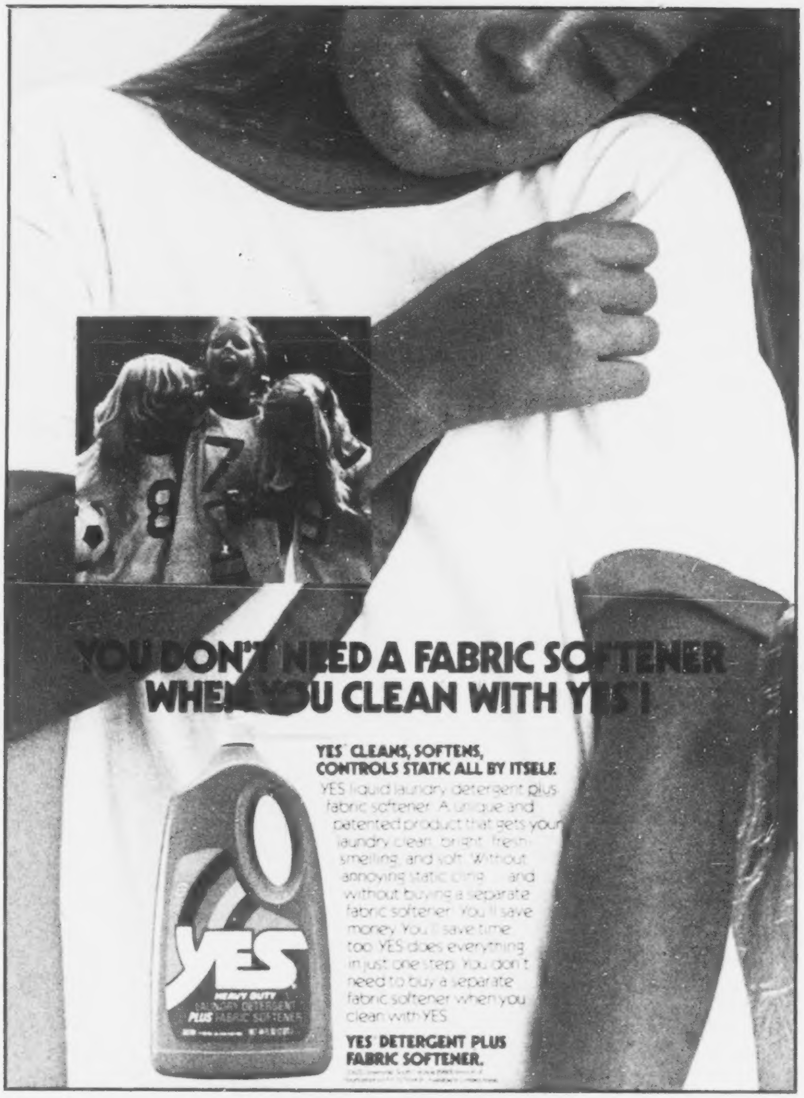
Soaps and detergents

The market for cleaning agents has been segmented for 40 years, allowing some smaller companies to find specialty niches and tackle the giants of the field in a $360 million media showdown. Procter & Gamble continues to dominate the category with only modest increases in ad budget as total spending holds even.

Since the 1940s when animal fat and lye detergents gave way to the chemically synthesized "washday miracle" called Tide, the soap and detergent industry has been segmenting itself. Powders are being replaced by liquid concentrates, which work well with liquid bleach, which complement liquid fabric softeners, which now come in fabric sheets that work in the dryer and not in the wash at all.

The result of this segmentation has been threefold. First, in dollar volume, Americans appear to rank cleanliness about even with Godliness, spending more on cleaning agents than on any household item. Second, in an industry dominated by giants, the segmentation has allowed several David's to find their specialty niches and stick there. And finally, it has created such intense competition for brand awareness — which translates into display and promotion in the store — that soap and detergent manufacturers spent more than $366 million in advertising last year with 92% of that total going to television.

As mighty as that spending total may appear, it has remained virtually unchanged since 1978, gaining 6% in 1979 and dropping six points in 1980,


YOU DON'T NEED A FABRIC SOFTENER WHEN YOU CLEAN WITH YES'!
YES HEAVY DUTY LAUNDRY DETERGENT PLUS FABRIC SOFTENER

YES' CLEANS, SOFTENS, CONTROLS STATIC ALL BY ITSELF.

YES liquid laundry detergent plus fabric softener. A unique and patented product that gets your laundry clean, bright, fresh-smelling, and soft. Without annoying static cling . . . and without buying a separate fabric softener. You'll save money. You'll save time too. YES does everything in just one step. You don't need to buy a separate fabric softener when you clean with YES.

YES' DETERGENT PLUS FABRIC SOFTENER.

Yes detergent from Morton Norwich's Texize Division combines cleaning with softening in $450,000 magazine ad campaign in 1980.

according to Leading National Advertisers. Network television gained almost $5 million last year, a 2.2% climb over 1979, but spot tv dropped more than $16 million or 17.8% less than 1979 LNA figures.

Magazines, which attracted 5.6% of soap and detergent media dollars, fell 29% last year. Only newspaper supplements and outdoor advertising, which combined accounted for less than one-half percent of the advertising total, recorded increased spending in 1980, except for the modest gain in network television. Radio media dollars dropped 6% to $1.6 million last year, attracting ads from cleansers only.

Few media directors for leading detergent accounts seemed able to explain the general decline in spending. Explanations ranged from the introduction of fewer new products and product categories, to the dropping of former big budget brands that either failed to live up to expectations in sales and market share, or became outdated by the introduction of liquid detergents to replace old-line powders. Further, the increase in private labels and generic brands has led several national manufacturers to redirect advertising dollars into in-store promotion.

Not every company has cut its advertising budget. In 1979, more than half of the top 21 manufacturers increased media expenditures by 15% or more. Seven companies reduced their ad budgets, with S.C. Johnson & Son leading the field with a 26.8% reduction. The remaining two companies, Procter & Gamble and Colgate-Palmolive, remained almost unchanged in 1979. In 1980, however, Colgate cut its media budgets for soaps and detergents by 25%, according to LNA.

From an advertising spending perspective, the industry is dominated by five companies: P&G, which spends about $180 million a year on soaps and detergents and has single brand budgets that dwarf many of its smaller rivals; Colgate-Palmolive, which has ranked second in dollars spent on media for years but is being challenged by Clorox, the dominant force in the bleach market; Morton-Norwich, which spends $7 million advertising its Spray 'n Wash brand alone, and Lever Brothers, the beleaguered U.S. subsidiary of Unilever Ltd., the largest consumer-products corporation in the world.

> **"A single medium becomes wasteful. With television, once you get into the third quintile and below, the waste becomes considerable."**

Together, the top five manufacturers account for 77% of all media dollars for the industry. The Goliaths turn predominantly to television, forcing their smaller competitors to turn more to magazines and newspapers while dabbling with the electronic media. All of the entrants, however, are after the same consumer: a woman age 18 to 49, preferably with two or more children.

Reaching the 19-load family

"Our demographics are all the same," said Stuart Shryer, executive vp at Stern Walters Earle Ludgin, the agency for A.E. Staley's Sta-Puf brands. "If we can get to the woman with two kids, we know she'll be doing up to 19 loads of laundry a week. And we also know that as many as 90% of the women will use a fabric softener within a six month period."

Getting to that woman with children

for the least amount of money is where strategy comes into play. For smaller advertisers, such as A.E. Staley, this includes a careful mixing of media with critical use of spot tv to bolster the brand's exposure and to be competitive on a dollar basis with Procter & Gamble in key markets.

For P&G, the strategy has led the company to use 45-second commercials in spot tv. In 1980, P&G tested five brands using 45-second ads on 100 television stations in major markets. In July, the test results had proven positive and the program was extended nationally.

Other factors, however, have affected P&G's brand budgets. Ivory Liquid and Joy Liquid, P&G's leading brands in light detergents, were cut back by as much as 33% in 1980, according to LNA. P&G officials declined to comment on the reductions, but one industry expert explained it this way:

"The hand dishwashing liquids have been hard hit by generic and private labels for the past few years," he said. "Non-liquid detergents are a little more costly to produce, but liquids are relatively simple. With more in-store competition, manufacturers were required to spend more in promotional support, redirecting money from the purely consumer advertising that they had been doing. Probably the hardest hit have been Wisk, Joy and Palmolive, and the liquid bleach products have been especially vulnerable."

The competition has not only come from in-store generic rivals. A.E. Staley's Sta-Puf fabric softeners are a case in point. Shryer of Stern Walters said that budgets on Sta-Puf's three brands, which include a full-strength pink liquid, a blue liquid concentrate and fabric sheet softeners, were increased by as much as 80% in 1979. The company bought heavily in magazines in 1979, using coupon ads to promote the new concentrate brand. In 1980, Sta-Puf put its nearly $5 million budget almost exclusively into television with free standing inserts in newspapers as back-up support.

"We are on all three networks with the three Sta-Puf brands," Shryer said. "We only use the spot tv in markets with high brand development potential, markets where we do 70% of our volume. The combined effect of our network exposure and our spot support gives us a total frequency and exposure in our key markets that is equal to P&G's at a much lower cost. We don't have their money so we have to be smarter. It must be working because we're the fastest growing softener in the market."

Cling
Free sheets
It's softness made simple

Each Cling Free® sheet has thousands of softness cells, filled with special softeners. The heat of your dryer releases them, so your whole laundry comes out soft and fluffy. Static-free. And smelling Springtime fresh. Cling Free's more convenient than the white sheet, too — from the box and the dryer. Also available in pump spray.

Beecham's Cling Free fabric softener sheets work in the dryer, and are backed by a $3 million ad budget devoted primarily to network television.

Shryer said Sta-Puf has not used any radio. "I just don't think it would be effective for us," he said. "We need the visuals to put across our message. Softener sheets are still a new product; with television, we can show the perforations. We can demonstrate that our sheets are reusable. We can't do that with radio."

Most of P&G's competitors have been unable to take on the giant consumer-products company head on its own turf, television. Clorox, which has dominated the liquid bleach market for several years, uses network television almost exclusively on its bleach products.

"We've always felt we were a national brand," said one Clorox insider. "So we've always used a national medium. We do use print, but only to reach a different audience. With Soft Scrub, for instance, we went with women's and shelter books because it is a product that can only be used on surfaces found in newer homes or renovated homes."

Soap and detergent spending, 1979-1980

MEDIA	1980	1979	% Change
Magazines	16,014	22,614	−29.1
Supplements	896	772	+16.1
Network TV	190,904	186,624	+2.2
Spot TV	71,909	87,536	−17.8
Network Radio	1,646	1,750	−5.9
Outdoor	86	30	+185.0
TOTAL	281,455	299,325	−5.9

Source: Leading National Advertisers

Figures cover only first nine months 1980 and 1979.

Total media budgets, 1980-79, First 9 Months

Company	1980	1979	% Change
Procter & Gamble	128,860	128,351	+0.4%
Colgate-Palmolive	29,122	39,083	−25.4%
Clorox	22,535	19,762	+14.0%
Morton-Norwich	19,656	22,048	−10.8%
Lever Bros.	18,736	18,033	+3.8%
TOTAL	218,908	227,278	−3.6%

Source: Leading National Advertisers

Ranking of 1979 soap and detergent spending

1. Procter & Gamble	179,984
2. Colgate-Palmolive	43,899
3. Lever Brothers	27,754
4. Morton-Norwich	27,576
5. Clorox	25,705
Sub Total Top 5:	$304,918
6. Bristol-Myers	11,529
7. American Home Products	10,470
8. Sterling Drugs	9,758
9. Beecham	7,658
10. American Cyanamid	5,843
11. Rio Tinto-Zinc	4,952
12. Purex	4,308
13. Economics Laboratories	4,288
14. A.E. Staley	4,096
15. S.C. Johnson & Son	3,549
16. Gold Seal	3,210
17. A.G. Bayer (SOS)	3,155
18. Dow	2,543
19. Noxell	2,533
20. Church & Dwight	2,130
21. Faultless/Bon Ami	1,650
TOTAL	$386,590

Source: Leading National Advertisers

Many of the smaller advertisers have found print to be helpful. "In the past ten years," said Gus Priemer, advertising services manager at S.C. Johnson & Son, "we have seen a significant shift out of television and into magazines. We give each frequency level a selling value and try to optimize our mix for the most effective reach. A single medium becomes wasteful. With television, once you get into the third quintile and below, the waste becomes considerable."

Priemer said his company, which is led by the Shout brand pre-laundry treatment, has used more than 50 magazines, concentrating primarily on women's and shelter books.

Even concentrating on the less costly print media can prove inhibitive to some of the smaller competitors. Economic Laboratories, Inc., which manufactures Electrasol, Finish, Glass Magic, Jet-Dry and new products Lime-Away and Free 'n Soft in the soap and detergent category, has placed its $4.5 million ad budgets almost exclusively into magazines.

"Our emphasis has always been in print," said Byron Ford, vp-marketing for Economic Lab's consumer division. "We've used all of the women's and shelter books and we've tried Reader's Digest and some others."

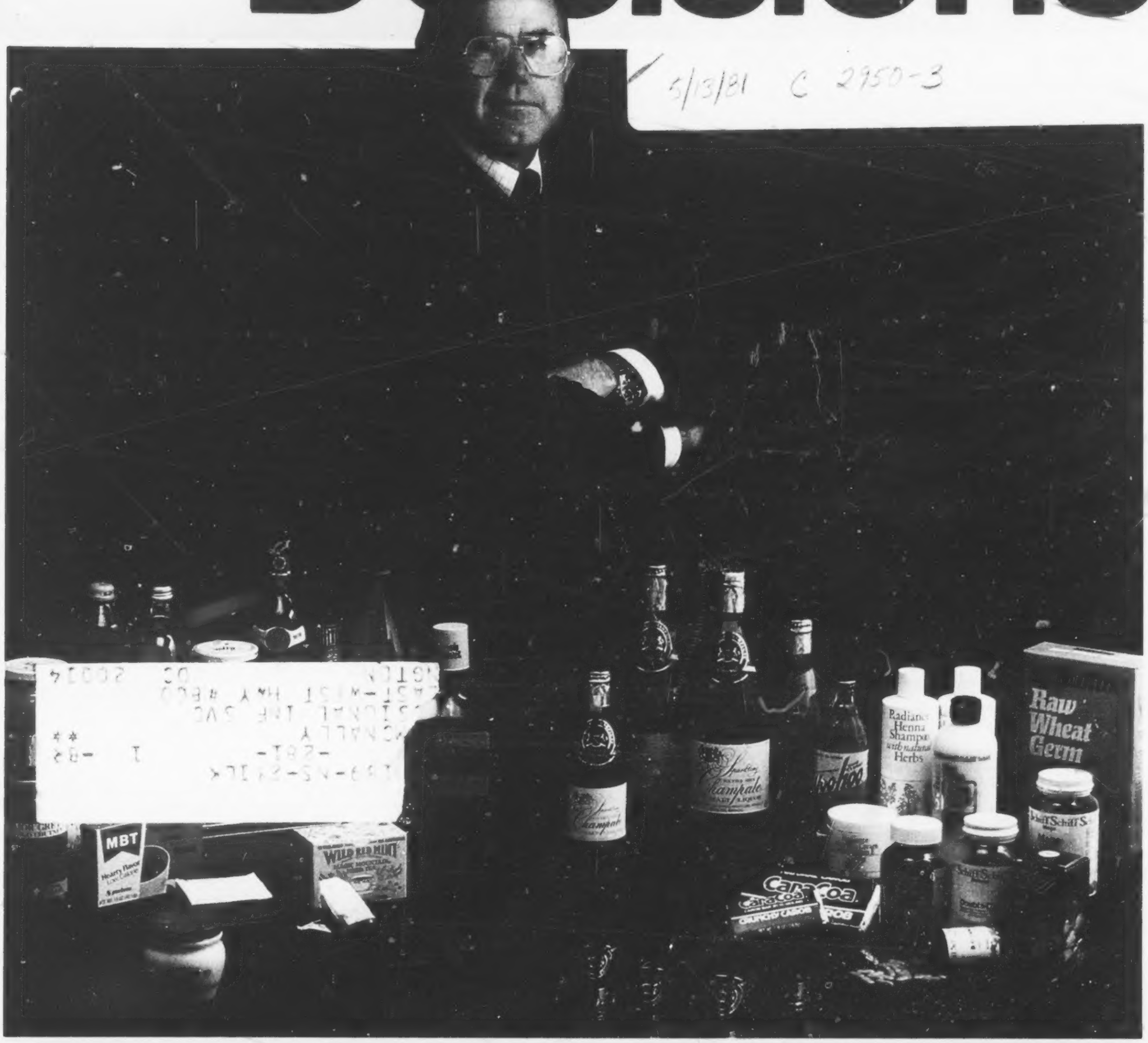
Ford called LNA figures for Economics Labs ad budgets inaccurate. The LNA figures showed a decline in ad budgets for each of the company's brands.

"We've had some reductions on particular brands, but the total dollars have remained the same from last year," he said. "The reduction stems primarily from our discontinuing ads on Finish dishwasher detergent. We held a number four market position and on reflection we decided that the volume of the brand did not warrant the minimal investment opportunity in front of us. We felt we couldn't maintain Finish's threshhold presence, so we cut back its budget and we're reassessing our long range goals with the product. But the decrease in ad dollars from Finish were redirected to the introduction of Lime Away, our new bathroom cleaner, and Free 'n Soft fabric softener. The total budget commes out to be about the same."

Craig Reiss

Decisions

5/13/81 C 2950-3


MBT
Wild Red Mint
Champale
Radiance Henna Shampoo with natural Herbs
Raw Wheat Germ
CaraCoa

Guest Editor Terence Fox, president of Iroquois Brands, uses advertising to add value to his growing bank of brands — some purchased, some line extensions page 70

Getting ahead in the Media Decade page 59

New team of Washington regulators page 64

Liquor budgets at over $350 million page 177

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Decisions
Getting ahead in the Media Decade
New team of Washington regulators
Liquor budgets at over $350 million

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and ceo of Iroquois Brands, Greenwich, Connecticut

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Microwave ovens have become the hot kitchen appliance, with current market penetration expected to double in the next three years.

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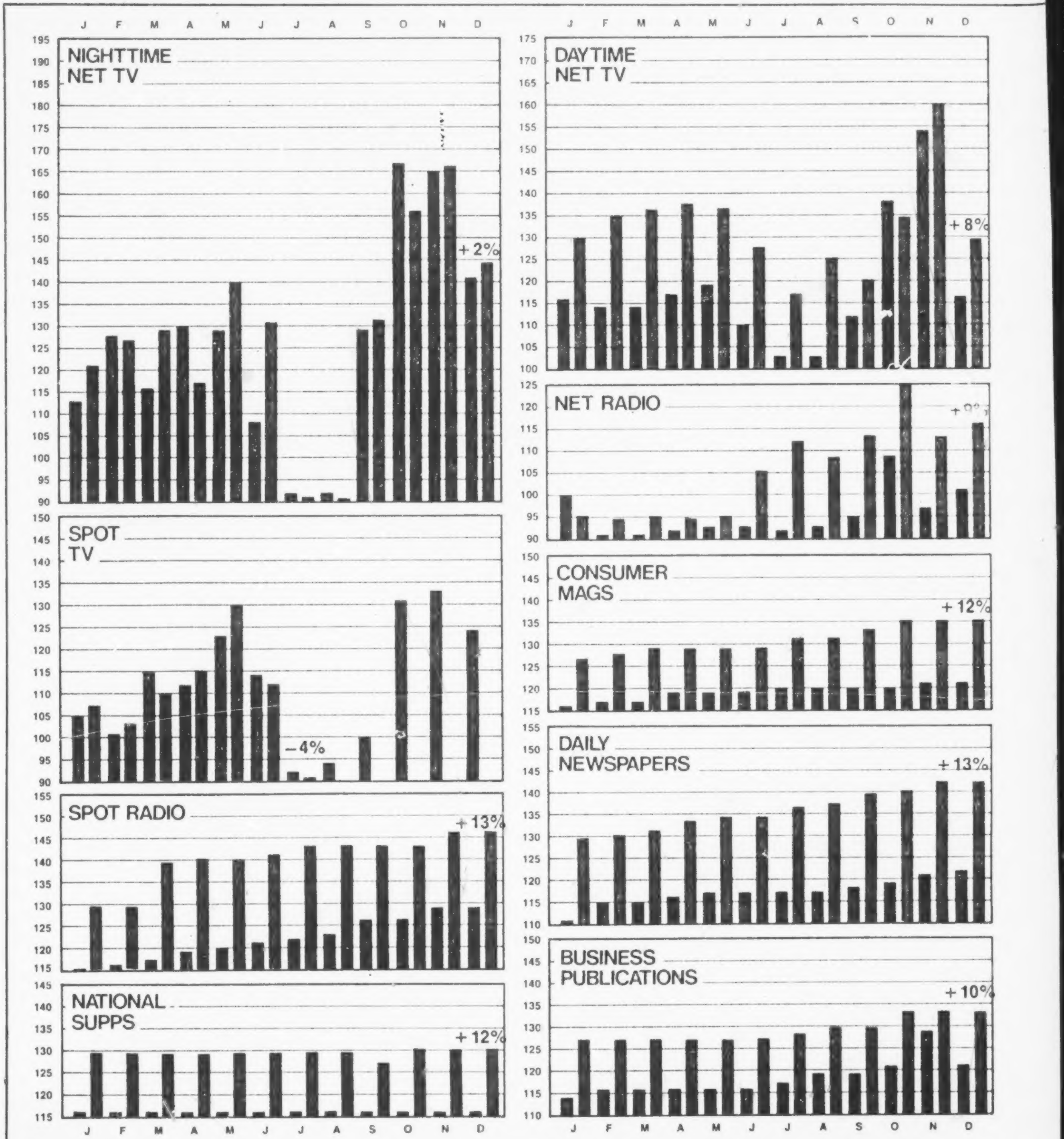
MEDIA COST INDEX

Black bars index for 1979; red bars 1980; base year 1977
Prepared by J. Walter Thompson Media Department



METHODOLOGY: The Media Cost index reflects industry reported trends extracted from available published sources. JWT Media Analysis utilized standard competitive report sources to develop comparable unit costs that reflected monthly cost trends by medium. Where industry competitive sources are unavailable, JWT sampled selected cost data from SRDS. Definition of the sources, universe, and media units used follows: *SOURCES* — **Nighttime Network TV**/BAR estimated commercial minute cost for *all* Nighttime Network TV (6 PM to sign-off). **Daytime Network TV**/BAR estimated commercial minute costs for *all* Daytime Network TV (Sign-on to 6 PM). **Spot TV**/BAR CUME National Spot TV Report for estimated commercial minute costs for *all* national and regional Spot TV activity in 75 markets. **Network Radio**/BAR Network Radio Report used to estimate *all* three network (Excluding MBS) commercial minute cost. **Attention: Due to a change in BAR's source for commercial minute cost we are now using Jan. 1979 as a base for new index. Spot Radio**/JWT estimates based on reported SRDS cost of one minute on one station per market in the top 50 RADI markets. **Consumer Magazines**/JWT estimates based on reported SRDS cost of a P4/C for 30 national consumer magazines based on circulation. **National Supplements** JWT estimates based

COST TRENDS
a Decisions analysis

The indicies on the page opposite and below show relative cost in each major medium for each month in 1979 (black bars) and 1980 (red bars) compared to the base year 1977. Unfortunately, the charts are the same as those appearing in the April issue. The researchers involved in updating the data at BAR and elsewhere have not completed important revisions in the data, so we are delaying production of updated charts for one month in hopes the improvements can be made at one time.

The tables here are complete through 1980 with the exception of spot tv, which is being updated, and may undergo revisions to more correctly reflect spot tv price trends.

Cost comparisons for some of the media in the early months of 1981 have become available, however. They are as follows:

- **In outdoor,** January, February and March 1981 were pegged at index 150, with March 1981 priced 14% over the same month in 1980.

- **In consumer magazines,** the January 1981 index was at 136, February index at 137, March 1981 at index 138. March 1981 costs were +9% compared to same month 1980.

- **In business publications,** January 1981 was index 125, with costs in that month up 6% over January 1980.

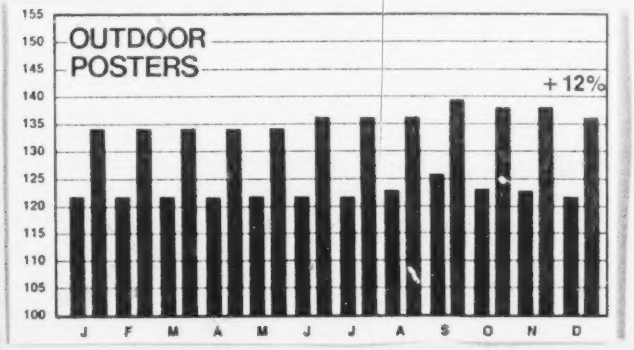
Seasonal variations — or lack thereof — were about the same in general, but there were exceptions.

Linear growth was evident in consumer magazine pricing, and in business publications, daily newspapers, national supps and outdoor — with the largest price hikes in these media coming at the turn of the years 1980-1981. Similar first-of-the-year price hikes are already evidenced for 1981 in outdoor but no dramatic hikes have occurred in January 1981 in consumer magazines or business publications.

Spot radio put through strong price increases in March last year.

Spot tv pricing in the first half 1981 almost mirrored seasonal price changes in 1979 — and at not much higher levels. Daytime tv did likewise (but at higher levels) until December, when its decrease was nowhere near as seasonally low as in 1979.

Nighttime net tv price patterns did not match 1979 at all in 1980 — except for the low-lows in July and August.



Source: Buyers Guide to Outdoor Advertising, 1980-81. Costs of Top 50 Showing in top 50 markets.

on reported SRDS cost of a P4/C for 3 newspaper distributed magazines. **Daily Newspapers**/JWT estimates based on reported SRDS cost per agate line for the largest metropolitan daily in the top 50 SMSA markets. **Business Publications**/JWT estimates based on reported SRDS cost of a P4/C for 46 magazines representing 42 business and professional classifications. **Posters**/IOAA reported rate card costs extracted from the Buyers Guide To Out-door Advertising for a 50-showing in the top 50 metropolitan markets as defined by Sales Management. **HOW TO READ:** Media Cost Index reflects latest available cost compared to base of average year 1977. Percent change reflects annual rate of change and is based on latest available month compared to same month previous year.

THINK
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FIRST

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BAZAAR
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CABLESCAN

Nielsen puts cable at 25.3% of households

The February 1981 Nielsen estimates for cable penetration in U.S. television households showed cable reaching 25.3% of the homes. The new estimate shows a dramatic increase over the 22.6% penetration measured in November 1980 — but the 2.7% increase, which translates into more than two million new cable households — is due in part to a new procedure for developing cable universe estimates.

Under the new procedure, Nielsen uses cable data collected from Nielsen Station Index local market samples and then forecasts using a "secret formula" based on data supplied by cable systems. Nielsen, however, is mum when pressed to reveal the nature or workings of the forecasting formula.

"The formula will have to remain Nielsen's secret for the time being," said Bill Behanna, Nielsen's director of press relations. "It's far too competitive out there for us to reveal the formula at this point."

The primary feature of the new procedure is the lessening of dependence on data supplied by the cable system, which consists primarily of subscriber lists. Using the subscriber lists in the past has failed to allow for the rapid growth of cable systems.

The new Nielsen procedure has ferreted out a more complete and accurate accounting of cable households, but there is no indication how many of the newly measured cable homes existed under previous surveys but were overlooked.

"The sample may well be overstated," said Behanna. "There's nothing to say that it has to be right. Generally, a higher degree of penetration will be indicated through a telephone survey.

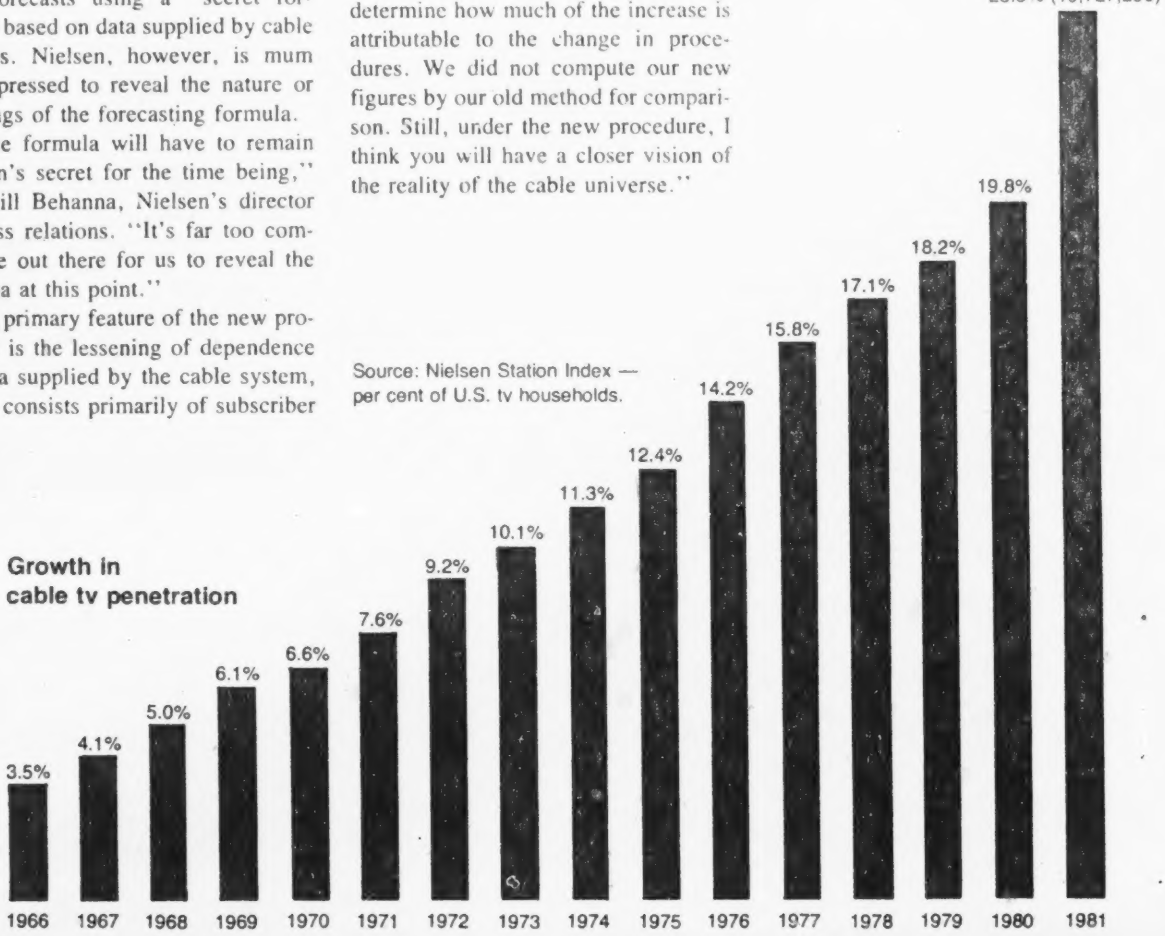
"We haven't done any figuring to determine how much of the increase is attributable to the change in procedures. We did not compute our new figures by our old method for comparison. Still, under the new procedure, I think you will have a closer vision of the reality of the cable universe."

ARTS premiers on cable systems without backers

Alpha Repertory Television Service (ARTS), the joint venture of ABC Video Enterprises and Warner Amex Satellite Entertainment, last month began broadcasting its nightly cable tv service devoted exclusively to the performing and visual arts. The programming was first aired on April 12 with none of the seven hoped-for

Continued on page 38

Growth in cable tv penetration



Source: Nielsen Station Index — per cent of U.S. tv households.

D.C.

Census finds dramatic rise in number of housing units

One of the big surprises emerging from the 1980 Census is the extent of increase in the number of housing units nationwide, and an accompanying decline in the average persons per household.

Between 1970 and 1980, there was a net gain of almost 20 million units, a rise of 28%. This increase had been considered unlikely by some housing experts at the beginning of the 1970s.

Conversely, Bureau demographers report that the average household size declined from 3.33 persons in 1964 to 2.75 persons in 1980. One-person households, which accounted for 15% of all households in 1964, grew to account for 23% of total households.

Of particular interest to marketers are lifestyle trends suggested by the numbers. The Bureau contends that the major factors behind the shift in housing are the greater number of single persons living alone, more childless couples and smaller family sizes.

Also of significance: the reduction in household size is contributing to an overall increase in the cost of shelter. Families are spending more of their budget on housing, which in turn reduces the amount of disposable income.

This is particularly true for those who rent. In 1977, almost 49% of renters paid one-fourth or more of their incomes for rent, compared with less than 40%, according to the Department of Housing and Urban Development.

The highest growth in housing units took place in the Rocky Mountain states, Alaska and Florida. Nevada had the highest growth rate, with a 96.8% increase; Alaska housing shot up 79%; and Florida housing was up 72%.

Selected types of households

Type of households (numbers in thousands)	March 1960 Number	March 1960 Percent	March 1980 Number	March 1980 Percent	Percent change: 1960 to 1980
Total	52,799	100.0	79,080	100.0	49.8
Family households	44,905	85.0	58,385	73.8	30.0
Married-couple households	39,254	74.3	48,151	60.9	22.7
Other family, female householder	4,422	8.4	8,530	10.8	92.9
Nonfamily households	7,895	15.0	20,695	26.2	162.1
Living alone	6,896	13.1	17,861	22.6	159.0
Average household size (persons).	3.33	—	2.75	—	−17.4

— Not applicable.

Source: U.S. Bureau of the Census, *Current Population Reports*, Series P-20, No. 357, October 1980.

Vacancy allows Reagan to choose FTC chairman

Commissioner Robert Pitofsky's resignation from the Federal Trade Commission in late March gave President Reagan his first opportunity to appoint a new member to the commission, possibly a chairman.

Pitofsky's resignation came just three weeks after David A. Clanton, one of two sitting Republican commissioners, was named acting chairman. However, neither Clanton nor Patricia Bailey, the other Republican at FTC, had been recommended for a permanent chairmanship in the Reagan Administration's transition study of FTC. Clanton is generally regarded as a political moderate, and Bailey reportedly was eliminated from consideration after delivering a speech in which she criticized proposed cuts in FTC's budget.

Clanton was given the interim nod since all five positions were occupied, and a chairman had to be chosen from among the sitting commissioners.

The White House has not yet indicated whether Clanton will be named permanent chairman, or if a Pitofsky replacement will get the nod.

One name mentioned as a possible chairman is James C. Miller III, who headed the transition study on FTC, and is now administrator for information and regulatory affairs at the Office of Management and Budget.

For an update on the Reagan Administration's approach to communication and marketing regulation, see "*Washington's new rulemakers*" on pg. 64 of this issue.

Marketers have doubts about Reagan's economics

If marketers are an accurate indicator, the business community isn't supporting President Reagan's budget- and tax-cutting economic recovery program to the extent originally expected.

Less than one third (31%) of marketing executives advocate a balanced budget, and only 12% favor tax cuts, according to a survey conducted by

Continued on page 42

cost per thousand than network television. The relative efficiency of producing a radio commercial enhances radio's cost advantage over network television, where the cost of producing a taped television spot to air twice (per ABC guidelines) would be exorbitant on a price/value basis.

Two other media factors should be considered. Television's reach potential is not a competitive advantage when advocates will be able to air their commercials only twice on ABC late-night, accumulating about an 8% reach in total. It doesn't take much media imagination to develop a radio plan that achieves that level of reach. Lastly, radio's lower out-of-pocket cost (remember, this is on an equal-time comparison base) gives a democratic nod to smaller corporations and organizations that would not be able to afford the production and commercial time costs that network television exposure dictates.

The passing parade

If advocacy radio is so right, why doesn't it exist? I don't know. The current deregulatory climate in Washington should allow the radio industry to clear out any obstructions promptly and not saddle itself with the kind of prohibitive restrictions evident with the ABC advocacy advertising proposal.

Certainly the magnates of radio aren't content to let the advocacy advertising parade pass them by without generating some needed sales vitality for a medium whose dollar volume and profit growth has lagged far behind its major competitors, who are all raking in advocacy advertising revenues. Or maybe they are content to be the good old boys I saw standing on the curb, shaking their heads, radios pressed to their ears, wondering where everyone is going in such an almighty hurry, and why everybody is making such a fuss. Maybe P. T. was right — there *is* one born every minute. ■

> “**The relative efficiency of producing a radio commercial enhances radio's cost advantage over network television . . .**”

TELEVISION
by ROGER C. BUMSTEAD
senior vice president,
director of media planning,
The Marschalk Company

Television's expanding outer limits

My associate, Bernie Guggenheim (after all, our multi-national name is Marschalk Campbell-Ewald) put some realistic facts and logic into place on the "narrowcasting" scene in the March issue. Bernie's well-stated thesis was that while there is a "plethora of programing" in the works or already available for catv, there are limits to its explosive growth, viz:

- Limited transponder space at present (but more satellites will be launched).
- Limited earth station receiving capabilities; only 150 catv systems have two 'dishes' (but in five years that will change, as well).
- Limited distribution facilities; 70% of catv systems could carry only 12 signals or less and they accounted for 58% of catv homes for 1979. (That too, will change).

Both of us are firm believers that the Cable Revolution has come – but a "with it" media professional has to be aware and able to consider and recommend realistic present day options that "over-the-air" TV now provides advertisers to meet advertising and sales goals next month in this overstretched economy of the USA in 1981.

Back at the agency . . . my Mr. or Ms. Media pro has to forget the shibboleths of the past — and create and sell new ways of looking at over-the-air TV, such as:

(1) Improved/different programing . . . and increasing HUT's and non-traditional viewing in under-valued dayparts such as late night, weekend mornings, and early morning.

(2) The growth in household accessability and tune-in to non-network TV stations . . . particularly to UHF stations.

(3) Changes in FCC rulings which will expand the number of TV stations beyond the 1,000+ now operating.

My catalogue is filled with several realistic tools for buyers and advertisers to consider as we look toward 1982 and the first half of the decade.

SPORTS: The three networks have almost doubled the number of hours devoted to sports programing (over 1400 hours in 1980) since the early '70's . . . a trend which will continue. Sports, which was almost an ABC monopoly in the mid-70's, is now a three network ballgame. This situation, with few exceptions, has provided advertisers with a wide-open buyer's market in 1980, and this is likely to continue all through 1981.

Sports programing traditionally is looked upon as the best way to reach upscale men, and rightly so. But often buyers forget who else is in front of the set — secondary influences of car and life insurance purchases . . . and primary purchases of many family needs. (The guy, who increasingly does the weekly grocery shopping is secondary, of course). So don't forget the numbers in Table A.

Whether there's a saturation point in sports tv is debatable; what has happened is sharper competition between the three networks (and cable networks) and vastly improved journalistic coverage for viewers — a better deal for the advertiser's dollar.

WEEKEND MORNINGS: Commenting on kid's tv would require at least three columns. An interesting fact dug from ten years of NTI's is a 124% gain in adults using tv on Saturday mornings. Teen viewing, too, is up 29%. Viewing to non-network stations is higher than to the three networks which program exclusively to kids, but adults and teens accounted for 48% of the three network viewing in the '79/80 season.

Table A: Average minute rating

	Households	Men	Women	Working Women	Teens	Children (Age 6-11)
Sports World/NBC (Sun.)	7.3	6.5	4.3	4.4	2.8	3.7
Sports Spectacular/ CBS (Sat.)	5.7	4.3	2.4	1.4	2.4	1.8
Sports Spectacular/ CBS (Sun.)	5.3	5.4	2.8	3.4	4.0	6.1
Wide World of Sports ABC (Sat.)	13.7	10.5	8.6	8.1	7.7	5.8
Wide World of Sports ABC (Sun.)	15.1	13.5	8.3	7.1	7.8	7.3

Source: NSI/NAD, Feb '81

Predictions are risky, but inexpensive to make (see below) – so I'll venture a guess that one network will move away from "kids" shows to a Saturday morning news/magazine show by the time the 1982/83 season starts, if not before.

Since I predicted that would happen on Sunday mornings back in July '78 (see The Great American Weekend), I can gloat about CBS's success story with Sunday Morning, which has had a 163% increase in its household rating since it began in February 1979. It's an upscale winner with a 114 index among viewers with a college degree plus.

ABC gets plaudits too for its innovative *Kids Are People Too* on Sunday mornings. Squire Rushnell, ABC's articulate programing chief for kids and early morning programing, aims its content high — so its no surprise to note its high teen viewing. Apparently a few adults also find it an early "brunch time" entertainment as well.

Face The Nation, Meet The Press and Issues and Answers and local versions in many markets have long ago been staples for financial and corporate advertisers. Despite low household ratings, they too fit, in some instances, my guidelines for a second look.

LATE NIGHT: Mon.- Fri. HUT level's over a five year span are up 5% from 11:30 p.m.— 1 a.m. in the 4th quarter. Total tv trendlines show significant "PUT" (people using television) increases among both older and younger men, a respectable increase for older women, a marginal decline for women under 50 and a whopping 33% increase for teens.

Again, it's attributable to a three network race and programing upgrading by major market "Indies".

Johnny Carson is still number 1 with a 7.5 household and a 24%, 1st Quarter '81 share. CBS movies and ABC news/entertainment (averaged) almost tie with 23% and 22% shares respectively. But 31% of the audience is elsewhere.

ABC's bold leap into late news (11:30 - 12 NYT) is a winner by the numbers, with an 8.0 households rating in this year's 1st quarter, and its emphasis on single subject coverage is well done by Ted Koppel.

NBC's *Saturday Night Live* is in the garage for a revamp. But ABC's clone, the sometimes tasteless *Fridays*, shows up with a 7.6 household rating so far this year.

Tom Snyder's *Tomorrow* show averages around a 3.0 rating year-round for the young and the restless . . . and the expanding all night American population.

Late night tv should be regarded as an "extension of prime"; programing qualities are good, either live news or entertainment or "just off network prime" re-runs. One major source projects a 15% cpm advantage for the '81/'82 season, late fringe vs. prime on a household basis; men 18-49 are at a cpm parity and prime has a 15% cpm advantage against women 18-49 — but those are 12 month averages. Reality rests with the clout and skill of the buyer and specific program selections by season and daypart.

EARLY MORNING: *Today* and Good Morning America appear to have settled down to a dead heat as of 1981's 1st quarter; but CBS' sleeper *Morning* will really enter the 3rd turn in September when its time shifts to 7:30 - 9 a.m.— with *Kangeroo* airing for a half hour at 7:00 a.m.

Again, good programing on all three networks provide increasingly good values for package goods advertisers, but never forget that traveling executive (very unscale) who turns his hotel

Table B: Major market UHF tv penetration — 1975/1980

ADI markets	UHF household penetration		Number UHF stations		All UHF share of primetime audience	
	11/75	11/80	11/75	11/80	11/75	11/80
New York	85%	99%	9	9	2	3
Los Angeles	91	97	8	9	4	4
Chicago	96	99	4	5	3	6
Philadelphia	96	98	6	6	8	10
San Francisco	91	94	9	9	2	4
Boston	93	97	4	6	8	12
Detroit	95	98	3	4	5	5
Washington D.C.	92	96	4	4	5	7
Cleveland	96	98	3	3	4	9
Dallas-Ft. Worth	92	94	1	1	2	2

SOURCE: ARB 11/75, 11/80

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telly, at least for now, more to the *Today* channel than the other two networks.

LOCAL TELEVISION: Dissecting opportunities market by market is an endless task, but there are 3 areas to highlight:

- Non-network stations: INTV, ably led by Art Elliott, appears to have proved through its elaborate Burke study that there's no difference in commercial recall between an affiliate and an "indie" — a fact, the more astute among us, long believed.

> "The glitter of new technologies is with us"

- UHF stations: Marschalk/Media Research has charted (Table B) the growth in UHF penetration, operating stations and primetime collective shares in the top 10 ADI's between 1975 and 1980. The growth in penetration was to be expected; 5 more stations are "on the air" and prime shares grew significantly in 7 of the 11 markets. While many UHF tv stations offer ethnic or "public" programing what is important is the large increase in share in several big markets — namely Chicago, Philadelphia, Boston, Washington, D.C., and Cleveland.

- Syndication: Buying into proven/low risk syndicated programs is a sound way to realize network programing value (in-program commercial placement/show quality) on a selective geographic basis at reasonable cpm's.

One could detail hidden values to daytime (many men work odd hours and the content of "soaps" now rivals *Penthouse* and *Playboy*) and early network news, as well. New developments — ok'd by the FCC last year — "drop-ins" and low power community tv stations are in the near term offing, too.

The glitter and excitement of new technologies is with us, but for those who want to *be there* big in the late '80's, looking closely at the tv opportunities offered by current tv's "outer limits" is mandatory. ■

MARKETING

by LARRY COLE

senior vp-director of media services, Ogilvy & Mather, New York

Our greatest asset

Since agreeing to contribute regularly to the Marketing column, I've been obsessed with the subject of my first effort. I wanted to be relevant to many, yet touch a nerve.

Why did I need this?

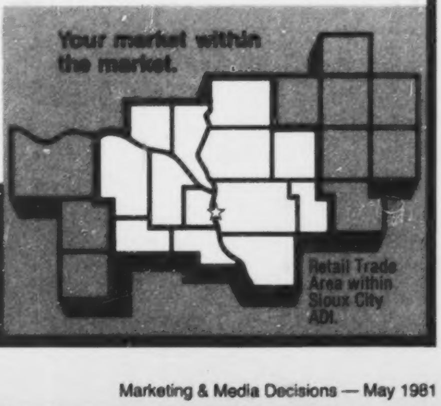
KMEG-TV
takes you right to fast-food customers within buying distance.

Consumers in the Sioux City ADI spend about $138 million eating out.* And 59% of those dollars are spent in the 13-county Retail Trade Area. If that's where your restaurants are, that's where your customers are. So when you advertise, you need to reach people within buying distance, not viewing distance as outlined by the ADI.

KMEG-TV is tailor-made to deliver Sioux City's rich "market within the market" effectively with top-rated CBS programming. It gets your message to your market most efficiently because you don't have to pay for reaching distant viewers who aren't your customers.

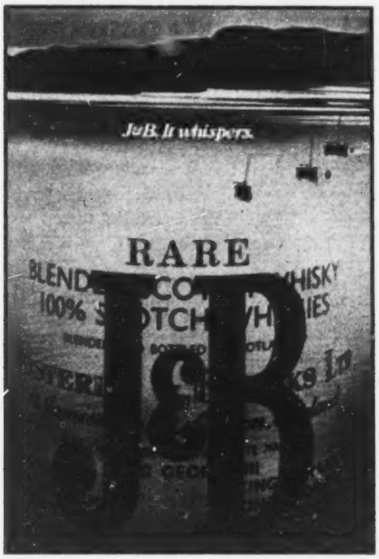
Advertising on KMEG-TV hits the spot. For more information, call your Avery-Knodel representative today.

*1979 S&MM Retail Sales Estimates.


Your market within the market.
Retail Trade Area within Sioux City ADI.

Felzer 50th Anniversary

KMEG-TV
A CBS Affiliate
A MEGAWATT OF SALES POWER FOR SIOUX CITY
Avery-Knodel Television National Representatives



Brand Report 65:

Liquor

A down year in sales was matched by curtailed media budgets as spending for the industry increased a scant 1% over 1979. But a handful of brands were able to buck the trend, increasing budgets and market share. In 1980, long term efforts paid off.

What's in a label?

That's a question William Shakespeare might ask if he was alive today and an avid magazine reader. He could hardly escape the numerous contests run by liquor brands challenging readers to find the element missing from the reproductions of the label design on the bottle.

That kind of game is just one of the promotions resorted to in 1980 by liquor advertisers to get more attention for their many magazine ads. Sweepstakes of various kinds were rife in what became a highly competitive year.

But one game they didn't resort to was the one called "keeping up with inflation." Combined expenditures in 1980 for magazines and Sunday supplements was up $2 million over the 1979 total, less than 1%.

Overall spending for the first three quarters, including outdoor, was up only $1.5 million over the first three quarters for 1979, less than one-half of one percent.

Liquor advertisers had increased their media budgets by 20% in each of the two previous years. The industry pattern has been to play catch-up with inflation, with periods of expanded spending followed by periods of budgetary contraction.

1980 wasn't an encouraging year for liquor marketers. Overall, according to an averaging of 1980 sales estimates, it was a no growth year as a tight economy made itself felt on the nation's distilled spirits consumption habits. Nonetheless, there were brands that demonstrated a growth performance, despite 1.3% decline in overall sales.

It was also a year in which several major brands changed agencies and unveiled new creative, and one in which Bacardi rum continued to build sales and further entrenched itself as the sales leader for the industry. Bacardi got a substantial assist from the Rums of Puerto Rico campaign, which was given a 20% increase in its magazine budget in 1980.

Impact, the liquor marketing newsletter, reported a decline in most categories for the first six months of 1980. The only exceptions were Canadian, brandy, tequila, and liquors and cordials. Brown goods declined more sharply than white goods.

Specifically, blends were off 11.9%, Scotch down 9.8%, bourbon down 5.1%, gin down 6.2%, vodka down 3.1%, rum down 26.4%. The rum decline, however, is misleading because a strike at the Bacardi plant in early 1980 put a severe crimp in rum shipments.

Among the winners, Canadian was up 3.1%, brandy up 11.4%, cordials and specialties including liquors and mixes up 9.5%, tequila up 1.8%.

Naturally, there were brands that performed well against a decline in the category. Among the eye openers were Jack Daniels, bourbon up 25% over 1979, Gordon's vodka up 12%, Kamchatka vodka up 25%.

Among the brand share losers there were some big names: Seven Crown down 5%, J&B down 8%, Dewars down 6%, Cutty Sark down 16%, Johnny Walker Red down 7%. It's no wonder that some new creative emerged in the latter half of 1980 and early 1981.

"We buy more on the basis of editorial content than on research." **Don Stork, Advanswers, agency for Jack Daniels.**

Media budgets for individual brands show few clear cut patterns, save in the trend observed in spending by Seagrams. Magazine spending was down on all but one primary brand, Crown Royal. 1980 apparently ended the Seagrams' policy of increased media expenditures in magazines.

Here's what the major distilled spirits brands did last year, and are planning for the remainder of 1981.

Bourbon

Looking at the performances last year of Jim Beam and Jack Daniels, it would be hard to ascertain that sales for the category were diminishing. Jim Beam held onto sixth place among the top 10 in sales, while Jack Daniels leap-frogged to eighth.

But erosion in the category becomes evident further down the sales ranking list. Ancient Age remained flat while Early Times, Kessler and Old Grand Dad posted losses. Clearly, Beam and Jack Daniels won converts in a shrinking market.

A price advantage may ad impetus to momentum attained by Jim Beam, while a strong word-of-mouth presence and a good degree of fashionability contributes to the amazing performance of Jack Daniels over the past decade.

Jim Beam, an American Brands product, is in the enviable position of running strongly counter to the trend in its category, and holding the number six spot in case sales in the U.S. *Impact* estimates that Beam sold 3,025,000 cases in 1980. Beam's proj-

Media expenditures for the first three quarters of 1980 for top liquor brands

Brand	Case depletions	Total	Magazines	Supplements	Outdoor
Bacardi	6,850,000	$2,865,100	$1,637,600	$ 39,300	$1,182,200
Smirnoff	5,900,000	4,848,500	3,297,000	28,100	1,541,400
7 Crown	5,260,000	7,114,000	5,581,000	1,174,900	375,700
VO	3,450,000	9,386,800	7,721,300	128,500	1,537,000
Canadian Club	3,065,000	5,194,500	3,622,800	—	1,571,700
Jim Beam	3,025,000	1,360,500	1,025,600	—	334,900
Popov	2,940,000	—	—	—	—
Jack Daniels	2,700,000	2,059,600	1,434,500	—	625,100
Seagrams Gin	2,650,000	3,753,900	3,337,800	—	375,700
Gordons Gin	2,580,000	1,326,600	837,200	50,200	439,200
Canadian Mist	2,350,000	5,194,000	2,475,000	—	1,979,800
J&B Rare	2,275,000	3,551,800	2,475,000	28,000	1,048,800
Windsor	2,250,000	2,572,000	996,200	—	1,605,800
Gordons Vodka	2,000,000	28,500	17,500	5,600	5,400
Dewars	1,895,000	2,641,900	2,139,900	56,100	391,900

Sources: Case depletions — *Impact*; media expenditures — Leading National Advertisers

Newspaper expenditures unavailable at time of compilation

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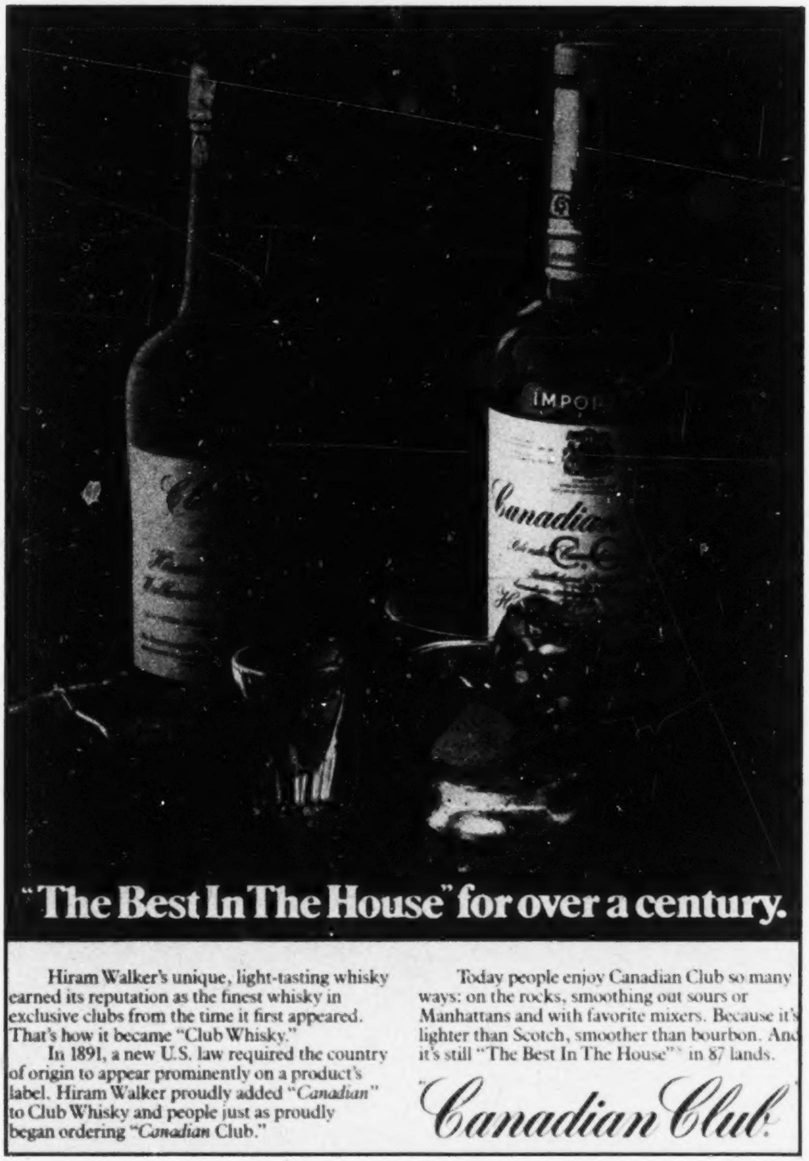


Hiram Walker's unique, light-tasting whisky earned its reputation as the finest whisky in exclusive clubs from the time it first appeared. That's how it became "Club Whisky."

In 1891, a new U.S. law required the country of origin to appear prominently on a product's label. Hiram Walker proudly added "*Canadian*" to Club Whisky and people just as proudly began ordering "*Canadian* Club."

Today people enjoy Canadian Club so many ways: on the rocks, smoothing out sours or Manhattans and with favorite mixers. Because it's lighter than Scotch, smoother than bourbon. And it's still "The Best In The House"® in 87 lands.

Longevity and quality are key points in Canadian Club's ads, which describe how Club whisky became Canadian Club.

ected goal in 1981 is 4,500,000 cases.

The success of Jim Beam is attributed to several factors, the most important of which is distinct brand identity. It isn't an impersonal abstraction evoking images of ancient history (Early Times, Ancient Age, for example.) It is also promoted not as a bourbon, but as Jim Beam.

Other factors contributing to sales growth are price in a downturned economy, the maturing of the baby boom generation and their developing taste for those distilled spirits flavors that are traditionally popular with the post-35 set. The swing toward a conservative political philosophy is also seen as benefitting the brand, as well as a growing willingness of women to be bourbon drinkers.

Geographic patterns are also playing a role in Beam's growth. Sunbelt sojourners who migrated from the northeast are apparently adopting the regional preference for bourbon, swelling the ranks of bourbon fanciers.

Beam advertising attempts to play on all these advantages in a low-keyed way. Two creative campaigns are used in magazines. One features a bottle of Beam behind a big glass, which implies that Beam is a leading brand and doesn't have to be pushy about label and bottle registration. The other shows young adults socializing with Beam as their brand, which provides an appeal to maturing baby-boomers.

The copy line for both ads reads: "Taste is all it takes to switch to Jim Beam." That slogan and the bottle form the basis for creative in out-of-home use.

The low-keyed ad is used in prestige, upscale magazines, and the other is run in publications making a lifestyle appeal.

The simplicity of the outdoor poster is also used in newspapers, which do not have a strong position in the Beam media plan.

Jack Daniels is at the other end of the spectrum in positioning, with its good-old-boy, rural Tennessee appeal. This brand sells for twice the price of Beam. Like Beam, it has very strong brand identity.

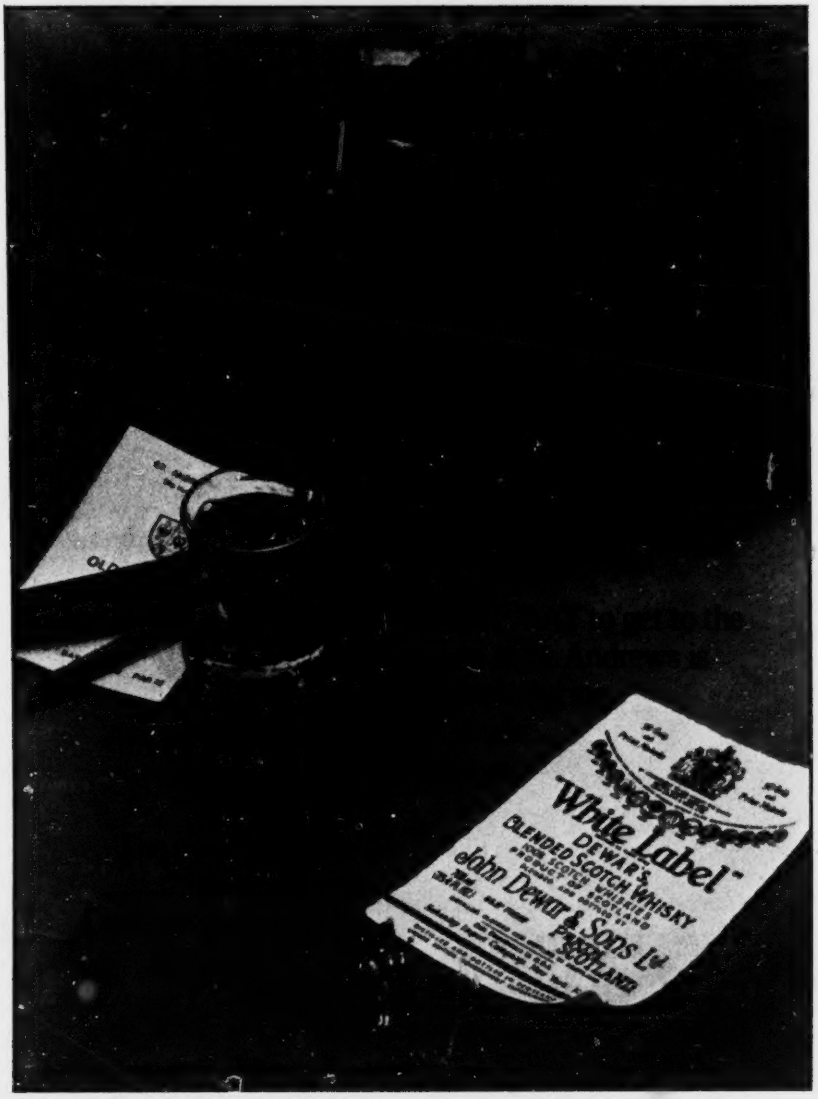
Growth last year was phenomenal, a 25% jump in case sales to 2,700, to move up to number nine in the case sales ranking. Jack Daniels is cited by *Impact* publisher Marvin Shanken as one of the fastest growing brands in the past decade.

How has Jack Daniels advertising helped create such product movement in recent years? Don Stork, president of Advanswers, the JD agency in St. Louis, thinks a key factor is that the "product is good and the copy is believable." The campaign has consistently stressed the distillery image and family feeling.

Jack Daniels creative continues to be unique in that it utilizes black-and-white only to reinforce the impression of simplicity. Says Stork, "It lands more credence to the distillery image."

But the use of fractional size does create some special considerations. Position becomes a key factor, says Gordon Hendry, senior vp at Advanswers. "We work long and hard to get a clean position," he says, meaning four columns of editorial copy adjacent to the ad. "We restrict the use of the magazine if we can't get that." Position is carefully watched at the distillery as well, he said.

Because Jack Daniels demographics are very broad, a long magazine list is used, including many books that aren't



Dewars Scotch has moved away from segmentation and its Profile series to a broad reach creative which it calls "Authentic."

subject to syndicated research. "We're very involved in specialized magazines, after we lay down the national base," Stock says. "We buy more on the basis of editorial content than on research."

With the use of such magazines as *Playboy* and *National Lampoon,* Stork thinks Jack Daniels has been particularly successful in reaching college-aged drinkers.

Outdoor, featuring bottle or label registration and an atmospheric Tennessee scene, is used where city magazines aren't available or strong enough to deliver good regional coverage.

Newspapers don't play much of a role in the campaign for reasons of reproduction and difficulty in obtaining exclusive positioning.

Jack Daniels performance was honored in the April issue of *Impact* as the most successful liquor brand in the U.S. The award is based on sales distribution, regional and national sales, and on premise and off premise sales.

Canadian

The distilled spirit from north of the border was the only one in the brown goods category to increase its share of consumption in the first six months of 1980. Consequently, most brands were doing well, large as well as small.

Canadian Club, Hiram Walker's flagship brand, had a good year. Total case sales were built to over 3 million as, according to *Impact* figures, a 1% gain was posted. HW continues to lead the category.

Over the years, Canadian Club has built considerable awareness with its "Hide-a-case" campaign, as well as its sustaining ad program.

Canadian Club magazine and supplement advertising was down slightly in 1980, according to LNA, but that trend is being reversed in 1981. Brand manager Alan Abrams said, "We anticipate an increase in 1981, primarily in magazines."

The Hide-a-case campaign, last seen in August of 1980, will reappear again this summer, Abrams said. "There will be some slight changes in format, which we think will make it work harder for us. It will run in four-color spreads and single pages."

Meanwhile, the Canadian Club sustaining campaign continues to feature the old and new bottles. "That's an interrupter that we started last February," he said.

Canadian Club's outdoor campaign continues with the bottle and the simple slogan, "Canadian Club - the best in the house." Said Abrams: "We think that's all we need to say and that the message is there for what is an awareness medium."

Canadian Mist is Brown and Forman's leading Canadian brans. It has been advancing like a brush fire over the past three years, and — racked up a 5% case sales increase in the first half of 1980. Continuing at its present growth rate, it will still be a few years before the brand overtakes Canadian Club.

Creative for the brand has focused on the outdoors, building an association between Canadian Mist and refreshing outdoor Canadian scenes of lakes and mountains. "Canada at its best," is the copy slogan.

C.R. "Bud" Ballard, vp and national brand manager for Canadian Mist, said that advertising budgets and sales goals are up for 1981, with the increases going mostly to magazines and outdoors.

We're looking at various segments of the market, black, military, and the general market, with the slogan 'Misting'. It depicts a very stylishly clothed black couple, and runs in magazines and about 15 outdoor markets, with 8 sheet 30 sheet and paint."

The military market campaign features the general market ad in the *Army, Navy* and *Air Force Times*, he said.

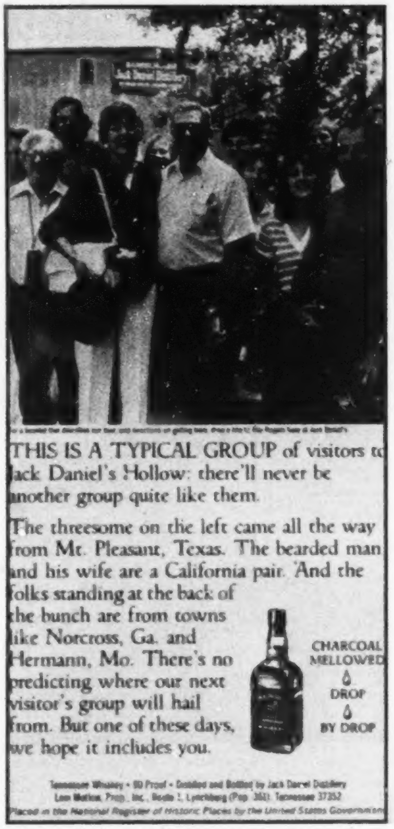
A separate campaign aimed at boosting bar business, Ballard said, is run in the industry trade magazines.

The 10-year-old consumer publication creative strategy was changed slightly in 1979, to bring the bottle and glass into broader relief. The agency McCann-Erickson, went to bleed position then for greater color impact, he said.

Outdoor, which is characterized as "a mainstay," is used for color, quality, impact, and to generate impressions." Canadian Mist uses outdoor in 220 markets.

Newspapers, which get about $1 million a year, Ballard said, are used where outdoor is illegal, which are some of Mist's best markets. "In most other markets it's either outdoor or newspapers, and in a few of our top metro markets, such as Chicago and Louisville, we use both."

Ballard said the brand is strongest in the south, Florida and North Carolina in particular, with good sales action in the southwest, particularly in Missouri.


THIS IS A TYPICAL GROUP of visitors to Jack Daniel's Hollow: there'll never be another group quite like them.

The threesome on the left came all the way from Mt. Pleasant, Texas. The bearded man and his wife are a California pair. And the folks standing at the back of the bunch are from towns like Norcross, Ga. and Hermann, Mo. There's no predicting where our next visitor's group will hail from. But one of these days, we hope it includes you.

Tennessee Whiskey • 90 Proof • Distilled and Bottled by Jack Daniel Distillery
Lem Motlow, Prop., Inc., Route 1, Lynchburg (Pop. 361), Tennessee 37352
Placed in the National Register of Historic Places by the United States Government

The relations of the Jack Daniels distillery to its visitors and its employees are key themes in the brand's fractional magazine ads.

Gin

1980 was a very slow year for gin. This usually popular white goods category floundered during the first six months of 1980 with a 6.2% decrease in case movement over the same period in 1979. But in spite of the poor category performance, the two sales leaders continued to bolster their brand shares with substantial increases.

Seagram's gin by far had the best of it with a 5% sales gain to take the number nine spot in sales ranking as compiled by *Impact*. The Seagram's gin magazine campaign is, creatively, an example of elegant simplicity. The copy reads, "Give your drinks our good name." The bottle forms the letter *i* in the graphic representation of the word gin.

But well as that has worked, Seagrams is now preparing new creative for the brand. Brand manager Andy Harmon declined to discuss what Seagrams has in mind for the last half of 1981 for the brand.

Spending for Seagram's gin will probably rise this year, from the $4 million plus that was invested in 1980. Magazines were the mainstay medium last year, with outdoor getting only about 10% of the expenditures listed by LNA.

Gordon's gin also had a very respectable year for Renfield Importers. The brand rolled up a 4% sales increase to cop the 10th spot in *Impact*'s inner circle list.

Gordon's uses exactly the opposite strategy from Seagram's, by relying heavily on out-of-home as its base media, according to Gordon's marketing director, Tom Mailander.

"Three years ago we were very heavily into magazines, and they weren't working very well for us. So we went into out-of-home and point-of-purchase, and things started going. The outdoor got the wholesalers excited. Our problem is that Gordon's gin isn't a new item."

Mailander also explained that consumer research showed that the previous campaign, with its 108 different drinks that could be mixed from Gordon's, confused the user. "We learned that the attributes the consumer was looking for in gin are, 'clean, clear and crisp'. So we went with that in our 'Crystal Clear' campaign, that shows the back of the label through the gin bottle.

A budget increase last year of 22% also consolidated Gordon's position, Mailander said, in which the media increase was more than 22%.

Rum

As goes Bacardi, so goes the rum category. There is no other category in distilled spirits so totally dominated by one brand. Last year, according to *Impact*, Bacardi moved 6,850 million cases of its brand. There isn't another

1980 newspaper expenditures for the top 15 brands

Brand	Expenditure	Brand	Expenditure
Bacardi	$ 836,900	Seagram's gin	$ 4,200
Smirnoff	848,400	Gordon's gin	180,500
7 Crown	2,999,200	Canadian Mist	762,600
VO	401,200	J&B Rare	666,400
Canadian Club	843,600	Windsor	1,740,800
Jim Beam	676,400	Gordon's vod	27,700
Popov	—	Dewars	1,631,300
Jack Daniels	—		

Source: Media Records

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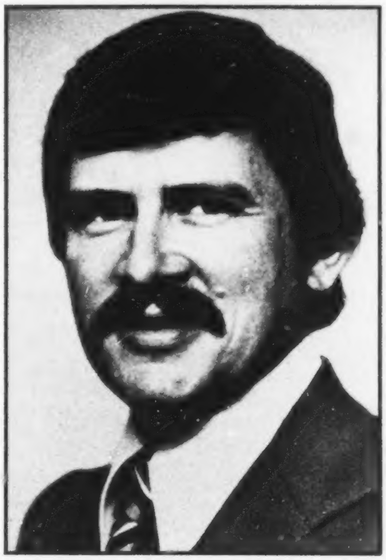
rum brand that moves even one million cases.

Bacardi's success methods are well documented, (See: "*How Louis Lassa ran rum to the top,*" June 1979, pg. 141). Bacardi magazine copy positions the brand as being mixable in a variety of interesting concoctions, as well as on the rocks. Bacardi was also able to stretch its magazine dollars by joining with Coca-Cola in joint ads that often offered self-liquidating promotions such as rum and Coca-Cola pitchers.

Bacardi effectively uses seasonal promotions and recipes stressing the tie-in with holiday celebrations.

William Bambrick, senior vp-management supervisor on the account at Ross Roy/New York, said: "Essentially, we're following the same program we've been using for the past several years. There has been some shift in magazines, but we're pretty much staying with the same media."

Currently, Bacardi is using full four-color pages with various mixed drink promotions, and in subsequent issues, is following with one third fractionals to add frequency.



"At the moment, we're using point of purchase and appropriate trade magazines," says **Thomas J. Mailander, national marketing manager, Gordon's gin and vodka, Renfield Importers, Ltd.**

Outdoor continues to be used in the top rum markets, where available. If it isn't, and more local support is needed, then newspapers are used, Bambrick said.

Scotch

The declining spiral of Scotch sales didn't halt in 1980, and there was little that any Scotch brand marketers could cheer about. Among the top 30 sales leaders, only the premium-priced Chivas Regal managed to improve its sales position. In the first six months of the year, the category was down almost 10%.

J&B Rare slipped out of the top 10 last year. But even before that, its importer, the Paddington Corp., took some action to stem a declining sales performance. The account was moved from E.T. Howard over to the hot new agency, Backer & Spielvogel. Larry Rosenthal, account manager at Howard, went along with the account.

The upshot of the agency change is a new campaign which veers toward the obscure. The specific claim of unique quality developed by Howard was replaced by the copy line, "It Whispers." It is the kind of creative that invites the reader to fill in the missing

Diario Las Américas.
Our readers drink it up.

DIARIO LAS AMERICAS
Amenaza con Convertirse en Crisis la

Bottle-up the Greater Miami Latin Market by advertising your liquor brand in Diario Las Américas.
For information on Diario Las Américas, call (305) 633-3341 or just mail your business card to
2900 N.W. 39th Street, Miami, Florida 33142.

Diario
Las Américas

The Spanish-language Daily Newspaper • Founded July 4, 1953

ONCE THEY STOPPED RUNNING THEIR OWN THEY BEGAN BUYING YOURS. AND BUYING. AND BUYING. AND BUYING.

North Carolinians had quite a reputation as whiskey makers. Some of the finest distilleries in the country were once located in our hills and mountains.

But once that era was ended, North Carolinians took to "store-bought" liquor with a passion.

Perhaps that heritage is one of the reasons that readers in The Charlotte News and The Charlotte Observer circulation area made our newspapers #3 and #4 in liquor advertising linage, nationwide.

To help you make the most of your advertising dollars in this incredible market, we've put together an extremely comprehensive package of facts and figures, demographics, and rankings by brand that cover Charlotte's SMSA and ADI. It's yours, free for the asking. We believe that once you see our numbers, you'll agree that the only thing Carolinians like better than making liquor...is buying it.

THE CHARLOTTE NEWS
The Charlotte Observer

Doug Hinson, Distilled Spirits Sales Representative,
Box 32188, Charlotte, N.C. 28232. 704/379-6330

In Syracuse,
21% of Prime Time Adults are watching Cable TV

According to a newly released study of television viewers in all time slots, 21% of the adult prime time audience in a major metropolitan market are switching to Cable TV every night. This and dozens of other eye-opening facts are contained in 2 new brochures "The Effect of Cable TV In A Major Metropolitan Market®," and Syracuse Newspaper Readership.

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To reserve your copies phone Dave Kaczorowski at (315) 473-7765

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HERALD-JOURNAL
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Represented nationally by Newhouse Newspapers

The Effect of Cable TV In A Major Metropolitan Market

elements of the verbal equation; just what J&B whispers must be filled in from the background context, a soothing outdoor scene.

While the creative makes a subtle appeal, will it halt a use erosion that may be attributable to the exodus of Scotch drinkers from the northeast to the sunbelt, and to different drinking patterns?

Media supervisor Syd Shane explained that the target audience for J&B is men, 25 to 54 with incomes over $25,000, with a special emphasis on the 25 to 34 age group.

"There will be slight changes in the Canadian Club Hide-a-case campaign." **Alan Abrams, brand manager, Hiram Walker**

The magazine campaign utilizes four-color pages in the newsweeklies and a variety of vertical publications, and men's publications. Newspapers get scant attention, with the primary focus a once-a-week insertion in the New York *Times*.

J&B invested heavily in contests and promotions in 1980. Publishers Information Bureau shows that in addition to regular brand advertising, J&B invested heavily in contests and promotions in 1980. Publishers Information Bureau shows that in addition to regular brand advertising, J&B invested $1,087,752 in various contest and promotional advertising.

Dewars, the Schenley import in the Scotch market, backed away from its segmented magazine campaign last year. Graham Walsh, advertising manager for Schenley Imports said, "We feel that the current 'legend' campaign transcends the boundaries established in the previous campaign, and appeals to everyone."

Previously, the "authentic" campaign which featured a kilted Highlander was used against "the traditional, more knowledgeable and self assured segment of the market." The "profile" campaign was used against the "young active achiever".

The profile campaign is still being used. "We still run Profiles and expect to continue," Walsh said. While some segmented books are being used, "most of the magazines we are all using are getting to just about everybody," Walsh said.

Dewars' outdoor campaign was revamped as well last year, switching from a Highlander and the bottle "to a more intrusive graphics of usage situation, say with a Dewars bottle set in a sea of ice cubes."

Coming up this year for Dewars is a Father's Day sweepstakes with trips as prizes. Walsh thinks that sweepstakes, for their own sake "aren't particularly brilliant ideas, but are good if they aid in reinforcing the brand image."

According to impact, Dewars suffered a 6% drop in 1980, but Walsh indicates that the year, and overall brand trend is better than *Impact* indicates. Walsh said the outlook for 1981 is "guardedly optimistic."

Vodka

The long term growth of this segment of the distilled spirits business was interrupted last year; the category slipped 3.1% from the year before. Perhaps there is some solace for vodka marketers that the decline was smallest in the industry overall.

That decline was felt mostly by low volume brands, and the largest volume brand, Smirnoff. But some of what its parent company, Heublein, lost from that brand, it gained from another, in an ironic twist. While Smirnoff was down 2%, Popov was up 5%.

The import Kamchatka picked up momentum and rolled up a 35% case increase, while Gordon's piled up a 12% gain.

There is more to Georgia than Atlanta...the
GEORGIA GROUP
AUGUSTA•COLUMBUS•MACON•SAVANNAH

'THE NATION'S #1
NEWSPAPER GROUP BUY'

●

Population . . . 980,300
Georgia Group Population Would Rank 38th In The Nation
60% More People Than Charlotte

●

Total Retail Sales . . . $3,602,813,000
Georgia Group Retail Sales Would Rank 40th In The Nation
42% More Retail Sales Than Charlotte

●

THE CHRONICLE & HERALD AUGUSTA	THE LEDGER & ENQUIRER COLUMBUS
THE TELEGRAPH & NEWS MACON	THE NEWS & PRESS SAVANNAH

GIVE YOUR DRINKS OUR GOOD NAME.
Seagram's
GIN
Seagram's Extra Dry Gin

Simplicity and coolness are the hallmarks of the creative magazine campaign for Seagram's gin.

Popov, Heublein's price brand, is developing sales momentum, althought it is relatively unadvertised. Smirnoff went into a decline after its somewhat controversial new campaign of mid-1979 attempted to reposition the brand as the darling of the beautiful now people who have candlelight dinners in row boats, wearing formal attire. That campaign was replaced by one depicting people at leisure involved in far less precious activities.

Eric Pierce, Heublein spokesman for the spirits division commented, "Popov's growth reflects a search by the consumer for a price range that they perceive value in. Its growth in sales in the past two years reflects a sluggish economy."

Support for Popov has been heavier in point of purchase and merchandising than it has in media, although the brand has received a sustaining TDI campaign.

Meanwhile, Heublein is gambling on its super-premium entry, Smirnoff de Czar. This new brand is being advertised in up-scale publications. In terms of acceptance, Pierce said sales are "right on schedule."

Hicks B. Waldron, president and ceo of Heublein, explained the dip for Smirnoff, in a presentation to consumer analysts recently: "In our brand planning for Smirnoff, we anticipated high inflation and a recession but we didn't forsee the intensity of inflation we got, nor the degree of its impact on consumers at all income levels.

"Our strategy was aggressive management of the premium aspect of the brand through pricing and related moves. Given the continuing high rate of inflation and the depth and duration of the consumer recession, it's understandable, although disappointing, that last summer's pricing move met with consumer resistance.

"We've hit a bump in the road with Smirnoff, and it's notable because it's a first for the brand. But it *is* a bump, not a mountain. Smirnoff's premium image is intact; the brand is resilient and vital; it's our number one priority."

> **"Gordon vodka is rolling up sales gains between campaigns."**

Heublein is countering price resistance with discounts on the half gallon size in May.

Gordon's is evidently the validation of the old adage, "nothing succeeds like success." According to *Impact*, the brand ran up a 12% sales increase, and the people at Gordon's say it was even higher. But ironically, there has been no consumer media activity for the brand for the past eight months.

Tom Mailander, marketing manager at Renfield Importers, explained that the brand is now between campaigns, and that Grey Advertising is testing two different creative approaches. "At the moment, we're using point-of-purchase and appropriate trade magazines," he said.

As of early April, Mailander was evaluating the results of the two different approaches to Gordon's vodka, and wasn't expecting to make his final decision until June.

The new creative for Gordon's vodka will be emerging in late summer, he thinks. Until then, Mailander is in the unique position of watching his brand grow with virtually no consumer advertising.

The new campaign will of necessity, appear in magazines and on outdoor posters.

What's the Fastest Growing County in Southern California?

VENTURA .... ☐
SAN DIEGO .... ☐
ORANGE .... ☐
SAN BERNARDINO .... ☐
SANTA BARBARA ..... ☐
LOS ANGELES .... ☐
RIVERSIDE .... ☑

Yes, Riverside, which grew by 44% during the past decade, is the fastest growing county in Southern California! What's more, State Department projections indicate that Riverside will continue to be both the fastest growing county in Southern California and the fastest growing large county in the entire state during the next two decades.

How to reach the residents of the fastest growing county?

THE PRESS ENTERPRISE .... ☑

As the principal newspaper serving Riverside County, the Press-Enterprise is, not surprisingly, one of the fastest growing papers in California, with a circulation now over 116,000 Sundays and 110,000 combined daily.

If you have a message for the residents of the fastest growing county in Southern California, we'll help you deliver it.

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Represented nationally by
Sawyer-Ferguson-Walker Co.

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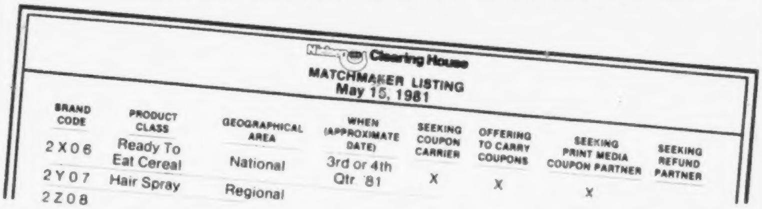
PARTNERS FOR YOUR CONSUMER
PROMOTIONS WITH MATCHMAKER™



Nielsen Clearing House

MATCHMAKER LISTING
May 15, 1981

BRAND CODE	PRODUCT CLASS	GEOGRAPHICAL AREA	WHEN (APPROXIMATE DATE)	SEEKING COUPON CARRIER	OFFERING TO CARRY COUPONS	SEEKING PRINT MEDIA COUPON PARTNER	SEEKING REFUND PARTNER
2 X 0 6	Ready To Eat Cereal	National	3rd or 4th Qtr '81	X	X	X	
2 Y 0 7	Hair Spray	Regional					
2 Z 0 8							

A quick review of your consumer promotion efforts for the past few years will point out an almost certain fact: the amount of promotion you get for each dollar you spend is declining rapidly.

One answer to escalating costs has been cooperative arrangements between organizations having compatible promotional objectives. The result is an increase in the breadth and scope of promotions, while cost-sharing keeps expense to a minimum.

The Matchmaker Concept Matchmaker is a bimonthly publication of the Nielsen Clearing House that contains offers by prominent national companies who seek partners in cross-couponing, print media tie-in or other promotion programs. It also gives subscribers a chance to enter listings to find partners for their programs.

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Call your nearest Nielsen Clearing House office or the NCH Marketing Department in Clinton and we'll send you a free information package.

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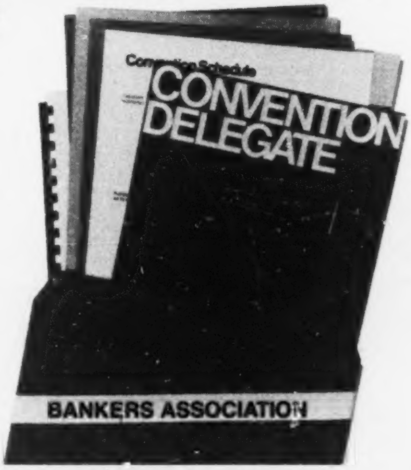


where smart advertisers meet 'serious spenders'
NEW YORK ■ CHICAGO ■ LOS ANGELES ■ WASHINGTON, D.C. ■ DALLAS

Conclusions

After 1980's lackluster performance, the liquor market doesn't appear to be headed for a swift comeback. Prevailing economic conditions tend to mitigate against a boom year, although once again, certain brands in even the poorest performing categories will show growth.

C. R. Ballard, vp — national brand manager, Canadian Mist.

Question marks among the star brands this year are Jack Daniels and Smirnoff. With its premium price, and questions within the industry as to where the distillery is finding the supplies to deliver a 25 sales increase, a lot of eyes will be on Jack Daniels this year and next. As it becomes a mass market brand, can Jack Daniels continue to maintain its rural Tennessee image as a small good-old-boys distillery?

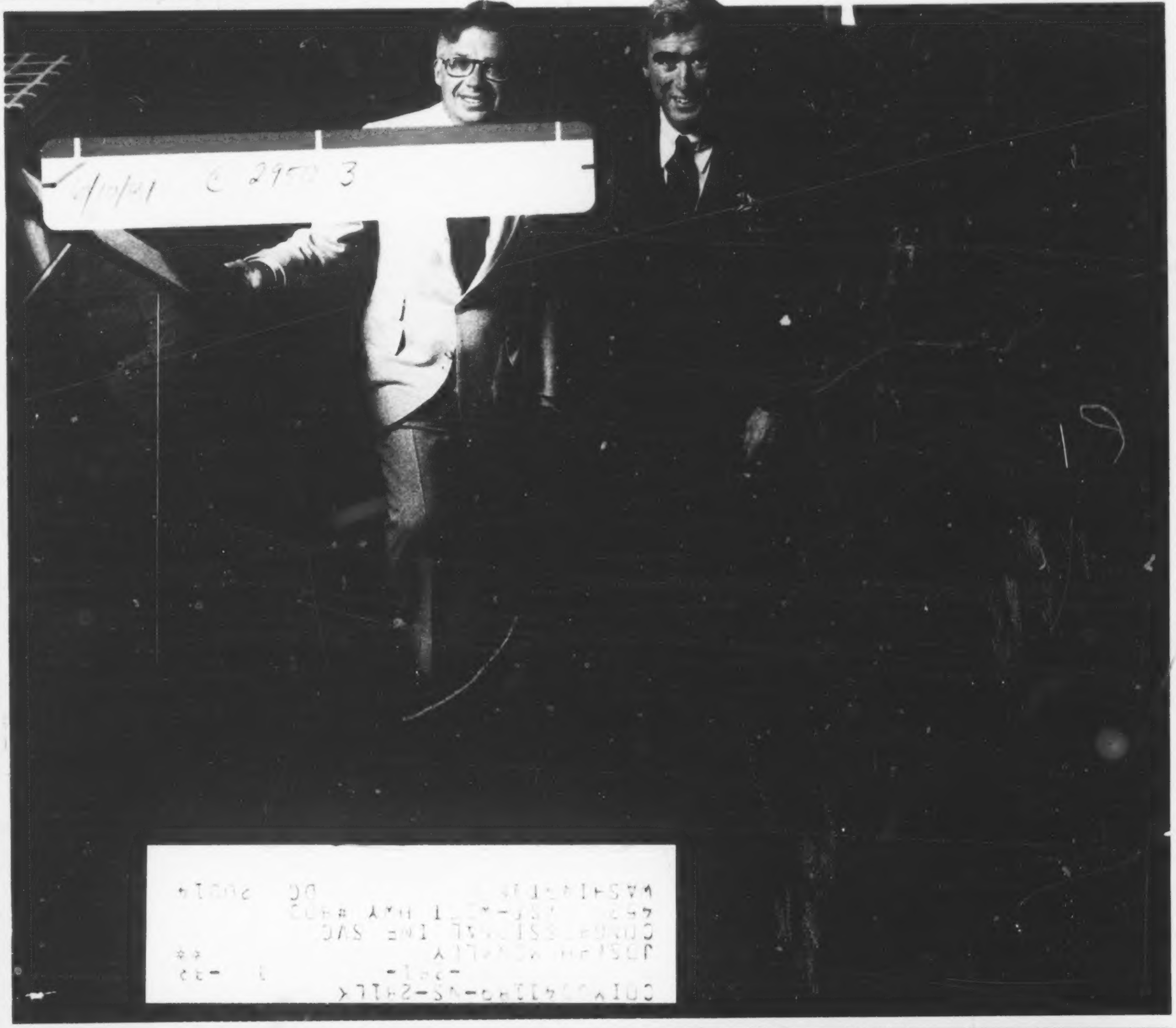
It would appear that the vodka segment of the market is in some state of disarray. The two brands that achieved the best growth in 1980 were largely unadvertised. Heublein has had little but transit advertising for Popov, and Renfield's brand, Gordon's, has been doing nicely tagging on the coattails of Gordon's gin. How well these two brands do in 1981 may provide some clues as to what will happen in the white goods segment of the market in the next five years. The smaller, top-end prestige brands of vodka will also bear attentive scrutiny.

Fred Gardner

JUNE 1981 • $3.00

MARKETING & MEDIA Decisions

4/10/81 C 2950 3



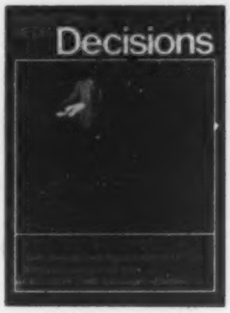
Guest Editors Hal Strauss and Donald Creamer are architects of fast growth agency, Creamer, Inc. They're pictured here on way to client conference at new Grand Hyatt in New York. page 72

Have advocacy ads found a spot on tv? page 59

Word processing's fast track page 70

EXCLUSIVE: 1980 newspaper ad dollars page 155

BEST AVAILABLE COPY



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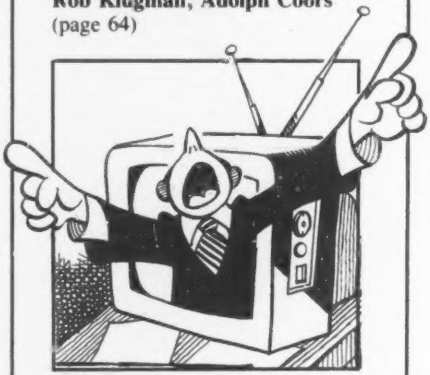

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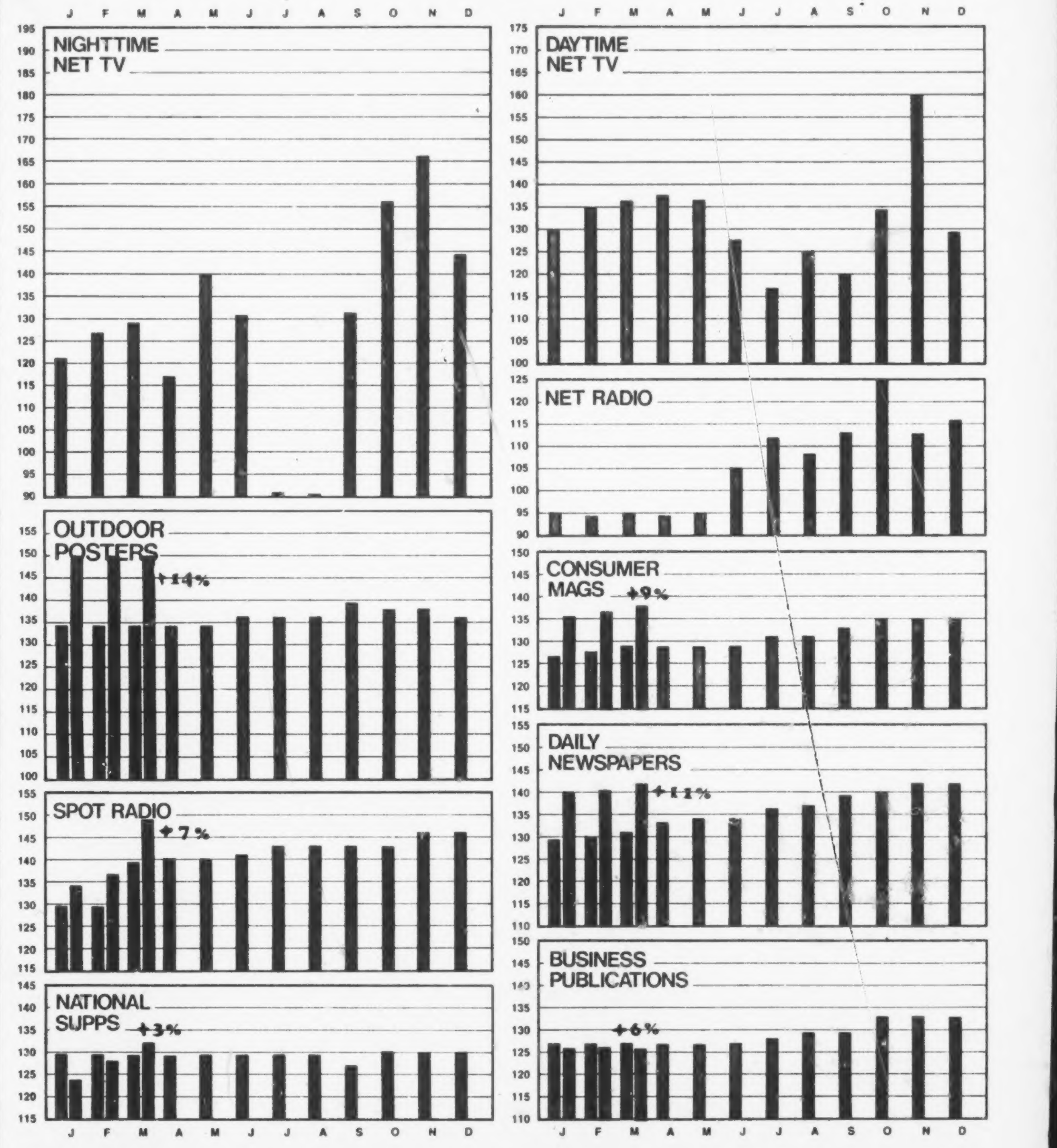
MEDIA COST INDEX

Black bars index for 1980; red bars 1981; base year 1977



The Media Cost Index reflects industry reported trends extracted from available published sources. This analysis uses standard competitive report sources to develop comparable unit costs that reflect monthly cost trends by medium. Where industry competitive sources are unavailable, selected cost data from SRDS are sampled. Sources: **Nighttime Network TV** — BAR/TvB estimated commercial minutes for all Night-time Network TV (6 p.m. to sign-off). **Daytime Network TV**, sign-on to 6 p.m. **Network Radio:** BAR Network Radio Report used to estimate three networks (not including MBS) commercial minute cost (base in this case is January 1969). **Spot radio** estimates based on reported SRDS cost of one minute on one station per market in the top 50 RADI markets. **Consumer Magazines** estimate based on reported SRDS cost of page, 4-color in 30 national consumer magazines based on circulation. **National Supplements** estimates based on reported SRDS cost of page, 4-color for three newspaper distributed mag-

COST TRENDS
a Decisions analysis

The expenditure reports on spot television based on Broadcast Advertiser Reports monitoring have undergone some important revisions. They will not be ready for inclusion on this page until the next issue. So spot tv costs are not reported in the charts this month.

We feel sure the delay in reporting will be very worthwhile because of improvements being made in the data by Broadcast Advertiser Reports and the Television Advertising Bureau, New York.

The revisions were undertaken because it was found that the totals — and therefore the levels of individual brand expenditures — produced by BAR were running considerably higher than the final Federal Communications Commission reports on spot tv revenue by markets.

Changes in tv activity levels reported to TvB since 1972 were found to jibe with the final FCC reports. This is not surprising in view of the fact that FCC and TvB are getting their data from the same source — the stations.

It is also not surprising that BAR's estimates were high. Its system was to monitor tv activity in 75 markets for one week each month.

Then BAR applied a price to each monitored spot, totaled the weekly spot, totaled the weekly dollars and projected them to monthly figures. These estimates — coming from one agency — tended to be high. Now its market prices come from several industry sources.

But, it was reasoned, the estimates would be even more accurate if the BAR figures were further adjusted to projected levels of FCC data, adjusted by TVB's rates of change. So this is being done, starting with the first quarter of 1981, to the BARCUME quarterly figures.

Back data on spot tv volume are being adjusted accordingly. From now on, the adjusted spot tv volume estimates will become available by the quarter only after they are weighted by TvB's reports from the stations.

The Cost Index published in *Decisions* every month will be based on these quarterly updates for spot tv — furnished as soon as they can be processed as in the past.

The following table gives the adjustment factors that are being applied to BAR's back data for 1978, 1979 and 1980 to bring it in line with the new 1981 system of reporting to match FCC/TvB figures on dollar volume:

	national spot	retail/local spot
1978		
1st quarter	.70	.76
2nd quarter	.67	.80
3rd quarter	.83	.91
4th quarter	.85	.89
year 1978	**.76**	**.84**
1979		
1st quarter	.71	.79
2nd quarter	.70	.82
3rd quarter	.89	.96
4th quarter	.78	.81
year 1979	**.76**	**.84**
1980		
1st quarter	.79	.81
2nd quarter	.79	.89
3rd quarter	1.06	1.06
4th quarter	1.07	1.01
year 1980	**.92**	**.94**

As these figures show, the BAR estimates for national spot have to be re-

Continued on page 51

azines. **Daily Newspaper** estimates based on Newspaper Advertising Bureau report of SRDS costs per agate line of a stratified sample of 155 newspapers. **Business Publication** estimates based on reported SRDS cost of a page, 4-color for 46 magazines representing 42 business and professional classifications. **Outdoor Posters** based on IOAA reported card costs extracted from the Buyers Guide to Outdoor Advertising for a 50-showing in the top 50 metropolitan markets as defined by Sales Management. **HOW TO READ:** Media Cost Index reflects latest available cost compared to base of average for year 1977. Percent change reflects annual rate of change and is based on latest available month costs compared to same month in previous year.

THINK HEARST FIRST

COSMOPOLITAN
Good Housekeeping
HOUSE BEAUTIFUL
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COST TRENDS

(from 13)

duced by 24 percentage points to make them comparable with 1981 data.

One confusion factor that still remains for BAR subscribers is that they will be getting monthly data in the first two months of each quarter that is not yet adjusted.

Monthly reports prepared by subscribers will be subject to correction at the end of each quarter. To avoid confusion, users of BARCUME may do what *Decisions* is doing — delay all spot tv reporting until adjusted quarterly data is available.

An important finding behind this switch is that the TvB quarterly reports add up to a very close correlation to the FCC annual reports, and TvB's reports are available much sooner than those out of the Washington Bureau. FCC does not issue reports until August for the preceding year. The TvB reports of spot tv volume change one year to the next are running only one percentage point higher than those from FCC.

Verification will not be possible until August 1982, when FCC data can be compared with BAR/TvB adjusted data for 1981. Meanwhile, users of spot tv expenditure data presumably will get better data by the quarter.

The newspaper index has also been revised with the help of the Newspaper Advertising Bureau. NAB's estimates are based on a stratified sample of 155 newspapers costs per agate line as reported in SRDS. This considerably broadens the base of the index and makes it more representative of newspapers across the country in some relatively small markets as well as the large metros. The base year for the new data remains 1977.

Other broadcast indices may be subject to further revision next month in order to take into account new Broadcast Advertiser Reports breaks and methods of compiling the data. For that reason no estimates of broadcast tv costs are included in the indexes in this issue. Indexes in other media are on-going, reporting data for months available to date.

ULTRA

MAGAZINE

The only magazine of luxurious living exclusively for the State of Texas — the nation's most lucrative and rapidly growing region — featuring fashion, fine art, music, personalities, exceptional photography, travel, design, sports, shopping, food, financial investment and Texas's own brand of style.

Ultra delivers the top five percent of the Texas market. *Ultra* reaches a readership of the most influential and affluent men and women in Texas, in a unique regional magazine that ranges editorially from international urbanity to down-home *de rigueur*.

Ultra's Premiere Issue closes July 15th for September distribution. For rates and mechanical data, contact your local representative or *Ultra Magazine*.

ULTRA

[illegible]

Cable shop-at-home continues to develop

Jim Perkins, producer of *The Home Shopping Show*, a made-for-cable video-mail-order program beamed to 470 cable systems and reaching almost four million households, predicts that cable television will completely revamp the American way of shopping. So firm is Perkins' predilection that his vision of future of retail commerce discounts the retailer's need to maintain a store front or to keep costly inventories on hand.

"Don't expect it to happen all at once," said Perkins to the first annual meeting of the Illinois-Indiana Cable Television Association in Indianapolis. "However dramatic the new technology might be, consumer habits are slow to change, often lagging 10 to 15 years. Television itself was available for 20 years before its use became widespread.

"People resist change. Why give up the excitement of shopping — the clean smell of the new merchandise, the sounds of people milling about, the cooling blandishments of the sales clerk in exchange for a picture in a box?" asked Perkins, quite rhetorically.

"Because the variety of goods and services that will be available on cable will be so great that consumers will be irresistibly drawn to it," he answered.

The track record of Perkin's *The Home Shopping Show* may indicate some cool logic behind his verve. Advertisers, at least, have been willing to give it a try. Since going on the air in September 1980, the program — which is entirely made up of product promotions but carries no conventional commercial "spots" — has attracted such "guests" as Maytag, Mr. Coffee, Borden's, Corning Glass, Encyclopedia Britannica, the Disney Book Club, Sherwin-Williams, IDS, Radio Shack, Pillsbury, and Vogue-Butterick.

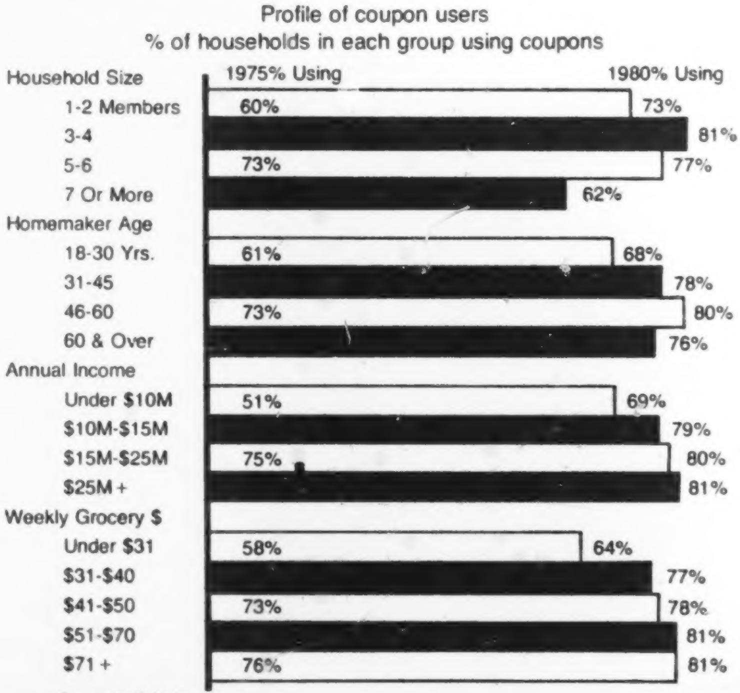
"All of these companies had a sales message they couldn't get across in traditional media," said Perkins. "Our show gave them a chance to really show their stuff. And our viewers, the consumers, were given a convenient

Continued on page 209

Demographic profile of coupon users

According to Nielsen's 1980 study on coupons, the profile of the most common coupon user is a homemaker, age 31 to 60, from a family of from three to six members with an annual household income of more than $25,000 and a weekly grocery bill in excess of $71. The biggest increases over Nielsen's 1975 findings came from households with three or four members, up 11%, and from homemakers over 60 years old, up 16%.

The 1980 study also found that over 80% of families with annual incomes above $15,000 use coupons. "The profile of the average coupon user is a mirrored image of the average cable subscriber," said R. Michael Jackson, president of the newly formed Cable Coupon Network.



Source: A. C. Nielsen Co.

At last, Dr Pepper is understood

Back in the early days of the 1970's, when Dr Pepper was struggling to break out of regional obscurity, a wailing radio commercial protested that "Dr Pepper is so misunderstood". Well, that's just not so anymore. The most recent sales ranking in carbonated soft drinks places the brand in the number three spot behind Coke and Pepsi, and drops Seven-Up to the number four spot. (See: "*Brand report 61: soft drinks,*" January 1981, pg. 139).

Top 10 Soft Drink Brands

	1980 Mkt Share	1980 Cases (000)	Brand Growth
Coca-Cola	26.5%	1,451,890.0	4.0%
Pepsi-Cola	17.9	980,710.6	3.9
Dr Pepper	5.5	301,335.7	3.0
Seven-Up	5.4	295,856.8	(2.0)
Tab	3.2	175,322.6	11.0
Royal Crown	3.0	164,364.9	0.5
Sprite	2.8	153,407.2	3.5
Mountain Dew	2.7	147,928.4	7.0
Diet Pepsi	2.5	136,970.8	9.0
Sunkist	1.5	82,182.5	100.0
Top 10	71.0	3,889,969.5	5.1
Other Brands	29.0	1,588,860.5	(0.5)
Total Industry	100.0	5,478,830.0	3.4

Source: *Beverage World* based on industry contacts
Measured in eight-ounce equivalent cases

Other movement within the top 10 shows Tab moving ahead of Royal Crown into the number five spot, and the swift climb of the new Sunkist brand to the number 10 spot, according to statistics compiled by *Beverage World* magazine.

Overall industry volume was up an estimated 3.4% with sales totaling 5.5 billion cases last year.

Meanwhile, Coca-Cola U.S.A. announced new advertising campaigns for its subsidiary brands, as well as the introduction of Ramblin' root beer into the New York market. The brand was test marketed in Salt Lake City, and Portland, Me. Radio spots are being localized to apply to individualized markets, mostly in the northeast region of the country.

Gillette tries to shave off a Spanish market share

Abandoning the theory that Hispanic users read English language ads, Gillette is making a concerted effort to reach the Spanish language market for its Atra razor line. (See: "*Hispanics – an ignored market?*" January 1981, pg. 68).

The campaign, which broke in mid-April, runs in every market with Hispanic populations of over 100,000. The buy includes the Spanish International Network and spot tv in selected markets. Mendoza, Dillon and Asociados, Newport Beach, Ca., did the creative for the spots.

Carmen Anthony Comite, group product supervisor for the Safety Razor Division, said "The Hispanic population is growing rapidly and is an important target group. U.S. Hispanics currently have a $52 billion gross income and will become the largest minority group in the early 1980s."

Wild Turkey gets back on the track

After a slight faltering in the marketplace, John C. Holley, vp, marketing, Austin, Nichols & Co., says, "Wild Turkey is getting back to basics." He noted that "over the past two years, the brand has not had the extraordinary growth of the previous eight years.

But now it is moving up strong again, right across the board, with increased consumer acceptance." (See: "*Brand report 65: liquor,*" May 1981, pg. 177).

Of the new spring campaign, Holley said, "what it will do is use the concept and imagery used in the brand's proven successful campaign and refresh it with more impactful headlines and visuals. The campaign will not change from its basic emphasis. When you have a sales increase of over 400% you don't change direction.

"The advertising for the brand has been characterized by a unique format which trades on the brand's special heritage and role in American history and the unique characteristics of the wild turkey bird itself. You can tell if you have a good campaign when no other bottle can be put in your format and work. We have such a campaign with Wild Turkey and that is one of the reasons we are implementing the refreshed, the stronger version of it."

Continued on page 42

livestock and poultry growers to increase production." *Feedlot Management* presumes" steady or slightly higher beef prices.

Motor and Automotive Industries say that new car sales will continue to be down, but that this will force prices on used cars up again. The parts and services segments of the auto industry are expected to post sales gains as consumers make long delayed repairs on cars they now own instead of buying new ones.

Where will available disposable income go? *Datamation* predicts a continued boom in personal home computers, and *Appliance Manufacturer* says microwave ovens will continue to be strong sellers.

A slowdown seen in fast food outlet growth

The foodservice industry is unlikely to sustain the rate of growth it has posted over the past 20 years, says a report from Predicasts, a research firm in Cleveland, Ohio. Over the next 15 years, away-from-home meals will account for 55% of the total food expenditures of Americans, up from 44% in 1979.

However, the study acknowledges that much of the growth will be caused by price increases. "Fast food outlets, the bellwether of the foodservice industry since the mid-sixties, will experience a sharp decline from the phenomenal 18% annual growth recorded over the past dozen years. Gains will slow to an average of 8.5% marginally above the forecast for industry-wide growth. Nevertheless, the fast food business is the most popular sector of the successful, albeit slowing, franchising industry, and it will remain highly attractive to potential investors."

The report suggests that restaurants will move to increase their share of alcoholic beverage receipts by promoting profitable bar business through increased entertainment and sophisticated decor.

In toilet paper, its softness that counts

Toilet paper purveyors would do well to emphasize the softness of their product rather than price, a study from Georgetown University suggests. According to a survey made by the school of business administration, 88% of customers surveyed in nearby supermarkets said they prefer the more expensive brands. Quality, equated with softness, proved to be the overriding factor in toilet tissue buying.

Extra Value is what you get when you buy Coronet.
Coronet
Coronet
Coronet
Coronet
4 ROLLS
Coronet Coupon Connection!
Win 15¢ or $15.00

67% of those surveyed say they buy brand name tissues, while 49% indicated that price is the most important feature. Only 33% actually buy the less expensive store brand.

Color and fragrance proved the least important considerations and were cited as a major appeal factor in no more than 5% of customer choices.

Retailers grew, but less than inflation in 1980

Maxwell Sroge Company, Chicago-based mail order company, reports that retailers — both over-the-counter and mail-order — grew at a slower rate than inflation in 1980. Result: profits were squeezed, but not as much among the mail-order retailers as among the over-the-counter giants.

Mail-order companies, Sroge reports, grew 10.3% in sales and showed after tax profits of 5.8%. Retailers grew 6.5% in sales and showed after tax profits of 2.3%. Arnold Fishman, president of Sroge, reasons that "mail-order companies are more flexible in a recessionary environment. They can adjust promotional volume and promotional expenses more readily than can retailers. Mail order firms are less dependent on physical assets and selling staffs."

Sroge lists the following ten leaders in sales among mail-order firms that are publicly held in 1980:

Colonial Penn Corp.	$799 million	+6%
Geico Corp.	726 million	+3%
Spiegel Corp.	412 million	−3%
Lane Bryant	401 million	+6%
Franklin Mint	360 million	+27%
Prentice-Hall	353 million	+26%
Commerce Clearing Hs.	261 million	+21%
New Process Co.	230 million	+2%
Horn & Hardart	128 million	+28%
Bear Creek Corp.	94 million	+15%

Sroge compared these "growth" figures to an inflation rate of 12% in 1980.

Ad manager salaries sliding behind inflation

Advertising managers' salaries are rising at an 8.8% rate, according to a survey of people in that position. The average salary in the U.S. and Canada is now $27,300, which despite falling below the inflationary spiral, places them among the leaders for the 20 middle management positions covered in the ninth annual survey conducted by the Administrative Management Society.

In the U.S., the national average for all 20 positions surveyed was $23,798, with a range between $18,400 for payroll supervisors to $31,700 for plant managers.

Has supermarket tv passed the test?

Television advertising in supermarkets isn't a new idea, but putting tv monitors over checkout counters is. Sales results from tv-equipped stores are better than in those stores without tv monitors over counters. Sales were strong on back-of-store items as well as those near the checkout area. Client and agency observers are impressed.

A captive audience is any advertiser's dream.

If ever there was one, it's the line at the supermarket checkout counter.

Here people line up with their grocery carts — and idle. Time is on their hands.

What can they do? Scrutinize the headlines and photos on the covers of *People*, the *National Inquirer* and other publications that have preempted the space closest to the cash register? Daydream? Resent the time wasted in mere waiting?

Kenneth L. Moss noticed the lagging time at the checkout counter back in 1977, and assembled a team of five investors to finance a way of putting waiting time in supermarkets to good use — for advertisers, that is.

That was the beginning of On-Line Media, Inc. Four years ago it was a far out idea to place tv monitors over supermarket checkout counters to carry a loop of short commercials. Tv monitors in supermarkets had been tried before in a variety of locations,

Tv monitors in supermarkets over checkout counters run six minute tape loops with three, five and ten second commercials.

but never over the checkout counter. They hadn't been effective.

Now the first two test runs are complete. On-Line has compared product movement in stores in which there are no tv monitors over the checkout counter to those that do, and the company appears to have a huge success on its hands.

However the theory sounds, the real question is one of results: do advertised products sell better in stores in which On-Line has monitors installed than in stores with similar volume but no On-Line Media system? So far, the answer appears to be yes.

Getting to the test stage took three years of organization, evaluation and planning. Initially, Moss and executive vice president Ransel Potter had to determine whether the overhead monitors would be so intrusive and disruptive as to prejudice store managers against their installation. Then they had to decide whether commercials should run with or without sound. They also discovered that a sweepstakes game involving the overhead monitors increased attentiveness to three-, five- and ten-second commercials.

By late fall last year, On-Line had installed monitors in supermarkets in New York, New Jersey, Chicago and Los Angeles. The acid test was ready to begin.

Now, results are in for two test periods, November 1 to December 29, 1980, and December 29 through January 26, 1981.

Results from the first test period showed an average 18.2% sales increase for the 33 brands advertised on check-out tv in 18 categories in the 14 OMI equipped stores. By comparison, the non-equipped control stores showed a 3.6% sales increase for the same 33 brands in 18 categories.

Seven of the ten brands showing the greatest sales increases in the OMI stores during the first test period were "back of the store" items. Three were located at the checkout counter.

The product showing the greatest sales increase in the OMI stores during the first test period used a single five-second commercial.

Second test period results demonstrated continued sales momentum in OMI stores in what is generally a down sales period. The 33 brands showed an average 19.1% sales increase while a 4% increase was noted in the control stores.

The category showing the greatest sales increase in the OMI tests was cosmetics; the lowest was cigarettes.

The results are satisfying enough for OMI to expand its operation as rapidly as possible into the top 20 markets. This will take about two years.

Client and agency responses to OMI's initial tests are guardedly optimistic. However, there is general enthusiasm for how OMI has developed its program and allowed advertisers to experiment with it.

Dick Hobbs, vp-associate media director at Leo Burnett, placed two Nestle products in the OMI tape loop, and was impressed with the result: "My feeling about the concept is that OMI did a good job of thinking it out, and a good job of allowing advertisers to test it in an inexpensive environment.

"It struck me that by its very nature, being a point-of-purchase medium, it has great potential.

No one has been able to do this kind of advertising before in an efficacious manner. It was well worth testing, and results to date appear encouraging."

As yet unevaluated, Hobbs notes, is

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THE
NEW YORK

Kenneth Moss, (right) president, and Ransel Potter, executive vice president, are piloting On-Line Media's checkout counter tv advertising effort.

the potential wear-out factor. "I think there's a definite potential problem in the length of time this medium is effective. It could become just another thing in the store that no one bothers to look at.

"They may have solved that problem with their sweepstakes and games, which will keep people looking at the loop to put down the names of advertisers, as long as the prizes are big enough and interesting enough."

As for OMI's future, Hobbs thinks it will either be a huge success or a vacant medium that no advertisers are interested in. "If it's a good idea, there will be a long line of advertisers waiting to get on. That's why we did it — to secure a position if it proves successful. But if it isn't, then they won't be able to give it away."

Bob Sperry, assistant advertising manager for Nestle, after the test period results, said: "I'm more excited about it than ever. I think it has great potential."

Sperry explained that after an initial decision to test OMI for its Crunch bar, Nestle decided to try to determine if a product adjacent to the overhead monitors would outsell a product at the back of the store, Nescafe. The presumption that OMI messages would give the nearby product the biggest sales boost was disproved. Nescafe showed the bigger sales increase, although the coffee category has been on a downward trend.

Sperry said that Nestle will continue to run tests with OMI, and set out the conditions for major employment of the medium. "To receive any substantial dollars from us, OMI must grow. It will have to cover 60% of the stores in the markets they are in — before we pull back dollars from spot television or other media."

The long term potential for OMI looks good to Sperry. "They have become programers by including sections from *Amazing People* which appears to have an audience holding quality."

Bob Freedlander, manager of media planning and coordination at Warner-Lambert, is biding his time on an endorsement of On-Line's effectiveness for four W-L products, Freshen-up and Trident gum, Shick razor blades, and the Personal Touch woman's razor. "It's too early to tell how well it has done for us. Our marketing department has some questions on the quality of the research. But the price is reasonable and it's been worth the gamble to generate data."

As for OMI's future potential for W-L, Freedlander said, "I don't see us using it on a continuity basis all around the country. We would use it for promotional reasons, regionally, and probably for heavy-ups. Without sound, it doesn't replace a 30-second tv spot. It is more of a reminder medium."

Santo Critelli, director of Bristol Myers in-house agency, Boclaro, finds OMI's results thus far "all positive." Critelli said some of his people had seen On-Line in operation and were impressed with it.

"My impression is that we will stay with them as they expand," he said. But he doesn't see it as a national continuity medium: "It would be too expensive a medium in which to maintain continuity. We would probably use it as a selective medium, in flights, as a heavy-up in markets in which we need reinforcement."

Some advertisers have withdrawn from the OMI tests, awaiting evaluations by agency research departments. Among them are General Foods (for Country Time lemonade crystals), Mars Candies, Scott Paper,

TEST PERIOD II FACT SHEET

Store Universe: 28 supermarkets in New York, Chicago and Los Angeles.

Store Sample: 14 OMI stores (equipped with the OMI System™) and 14 Control stores (matched for demographics, All Commodity Volume, weekly transactions, etc. against the OMI stores).

Base Period: November 3 – November 30, 1980

Test Period II: December 29, 1980 – January 26, 1981

Number of Brands Tested/Audited: 33

Product Categories (represented in test): 18

	Average % Change Over Base Period		% Difference For OMI Stores Over Control Stores	
Category	OMI Stores	Control Stores	Cat. Avg.	Cat. High
Batteries/film	+35.1%	+20.7%	+14.4%	+17.2%
Razors	+19.0	−13.3	+32.3	+42.3
Candy Bars	+23.6	+12.0	+11.6	+12.1
Internal Analgesics	+9.5	+2.0	+7.5	+17.0
Hair Care	+11.2	−2.2	+13.4	+21.2
Cosmetics	+55.9	−11.7	+67.6	+67.6
Gum	+42.2	+29.6	+12.6	+19.2
Cigarettes	+6.7	+3.9	+2.8	+2.8
Cereals	+15.5	+2.9	+12.6	+15.0
Tuna	+12.9	−0.2	+13.1	+21.7
Soft Drinks	+26.4	+14.6	+11.8	+11.8
Household Cleaners	+12.2	+8.5	+3.7	+4.3
Dishwashing Products	+8.8	−3.1	+11.9	+11.9
Coffee	+18.3	−8.6	+26.9	+26.9
Macaroni	+34.1	+8.5	+25.6	+25.6
Frozen Foods	+9.3	+5.2	+4.1	+4.1
Eggs	+5.9	−2.2	+8.1	+8.1
Magazines	+15.3	+5.4	+9.9	+18.6
All Products	+19.1	+4.0	+15.1	+67.6

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Dick Hobbs, vp - associate media director at Leo Burnett, Chicago.

Miles Laboratories, and Reynolds Metals.

Scott's agency, J. Walter Thompson, has been somewhat reassured by the results of OMI's first two tests, but still wants a thorough research department evaluation.

Ogilvy & Mather, General Foods agency for Country Time, tested the OMI system for the product, and found the results to be inconclusive on their terms, and consequently discontinued its exploration.

Expansion of OMI's system into more stores depends not only on available capitalization but on the willingness of supermarket chains to play host to the system. Supermarkets are reimbursed by OMI, at a rate of $6 for every 1,000 customers passing through the checkout line. While Dominicks, in Chicago, has been receptive, the Jewel chain declined the opportunity. Jewel advertising manager Harry Segal acknowledged that the chain wasn't working with OMI, but declined to explain why.

However, the Blair Television division of John Blair & Co. is confident enough of OMI's future to become the exclusive representative for the service. Gordon T. Sulcer, senior vp and marketing director for Blair Television, commented: "Gaining access to the multi-billion dollar promotion segment of the consumer product marketing allocations of major advertisers will augment our sales development strength for the entire spectrum of Blair Television sales representation operations."

A summing up of the prospects for On-Line Media from the agency point of view comes from Thurman R. Pierce, Jr., vp, U.S. manager, print media, J. Walter Thompson: "On-Line is a medium with promise that is in the very early stages of development. Its premise is based on a long-range plan which — three to five years from now — could give us deep penetration into major markets.

"But, the new medium needs advertising support as it grows from 100 to the thousands of stores needed for the system to make a real impact on brands' total sales in markets the size of New York, Chicago, and Los Angeles. To put it in perspective, On-Line estimates that in these three giant markets there are 5,000 supermarkets with 10,000 transactions a week. This fall, the system will be installed in 100 stores. It is a long road from 100 to the thousands of stores needed to offer effective market penetration. The success of the medium lies in whether or not advertisers will:

(1) Support On-Line through its growth stage.

(2) Even more important, will they invest time and money to do their own tests to determine the right product, the right brand, the right creative commercial, and the right length of commercial?

"The growth stage gives advertisers the opportunity to do their own recall and product tests for a low dollar investment.

"On-Line's own recall and product movement tests should be sufficient to encourage certain advertisers to test and make the On-Line Media network into a profitable and effective competitive component of their advertising, merchandising and sales promotions.

"These advertisers — while supporting the growth of the new medium — will position themselves to reap its greatest benefits when the medium matures." ■

digital

DIGITAL'S COMPUTER STORES:

ATLANTA (404) 523-2105
25 Park Place N.E.
BOSTON (617) 482-0900
175 Federal St.
CHICAGO (312) 782-7406
206 N. Michigan Ave.
CINCINNATI (513) 241-0888
Fourth & Vine
CLEVELAND (216) 241-6180
1903 E. 9th St.
COLUMBUS (614) 461-1690
180 E. Broad St.
COSTA MESA, CA (714) 540-4540
3390 Harbor Blvd.
DALLAS (214) 631-2520
1625 W. Mockingbird
DENVER (303) 825-5627
555 17th St.
GARDEN CITY, NY (516) 741-6484
300 Garden City Plaza
HOUSTON (713) 840-0730
1980 South Post Oak Rd.
LOS ANGELES (213) 629-0121
435 W. 7th St.
MANCHESTER, NH (603) 668-4005
Mall of New Hampshire
MINNEAPOLIS (612) 340-9250
629 2nd Ave. S.
NEW YORK (212) 599-0200
43rd St. & Madison Ave.
PHILADELPHIA (215) 568-3530
1500 Market St.
PHOENIX (602) 277-4363
3800 North Central Ave.
PITTSBURGH (412) 765-2751
Forbes Ave. & Stanwix St
ST. LOUIS (314) 291-0774
Northwest Plaza Shopping Center, St. Ann
SAN DIEGO (714) 232-0888
949 Second Ave. at E. St.
SAN FRANCISCO (415) 392-0284
369 Pine St.
SCHAUMBURG, IL (312) 843-7857
1037 E. Golf Rd.
SEATTLE (206) 625-0002
1100 4th Ave.
SHERMAN OAKS, CA (213) 501-5256
15436 Ventura Blvd.
WASHINGTON, D.C. (202) 466-8926
1850 K St., N.W.

DIGITAL'S WORD PROCESSING SALES OFFICES:

ALBUQUERQUE, NM (505) 345-4471
ATLANTA, GA (404) 252-2600
BOISE, ID (208) 375-7090
BOSTON, MA (617) 426-0300
BRIDGEPORT, CT (203) 371-6947
CHAPEL HILL, NC (919) 493-2531
CHARLOTTE, NC (704) 525-7150
CHERRY HILL, NJ (609) 665-8711
CHICAGO, IL (312) 263-3240
CINCINNATI, OH (513) 241-0888
CLEVELAND, OH (216) 241-6180
COLUMBIA, SC (803) 798-9494
COLUMBUS, OH (614) 461-1690
DALLAS, TX (214) 620-2051
DENVER, CO (303) 773-6535
DETROIT, MI (313) 348-8900
EL SEGUNDO, CA (213) 640-1830
HONOLULU, HI (808) 524-1943
HOUSTON, TX (713) 977-7575
INDIANAPOLIS, IN (317) 298-7300
KNOXVILLE, TN (615) 690-1521
LANDOVER, MD (301) 459-7900
MANHATTAN, NY (212) 971-3300
MERIDEN, CT (203) 634-5367
MIAMI, FL (305) 652-6841
MILWAUKEE, WI (414) 784-1311
MINNEAPOLIS, MN (612) 854-6562
NEW ORLEANS, LA (504) 888-7230
PHOENIX, AZ (602) 267-1364
PITTSBURGH, PA (412) 856-7200
PORTLAND, OR (503) 245-1341
PROVIDENCE, RI (401) 438-6750
RICHMOND, VA (804) 747-1300
ROCHESTER, NY (716) 223-2360
SACRAMENTO, CA (916) 924-9111
ST. LOUIS, MO (314) 291-0774
SALT LAKE CITY, UT (801) 268-3392
SAN DIEGO, CA (714) 292-1818
SAN FRANCISCO, CA (415) 397-8670
SEATTLE, WA (206) 453-5500
SOMERSET, NJ (201) 469-9211
SYRACUSE, NY (315) 474-8291
WESTCHESTER, NY (914) 631-6500
WILMINGTON, DE (302) 995-2111
WOBURN, MA (617) 935-9736

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1980 for the newspapers was a year of growth in some areas and retraction in others. The nature of the recession that gripped the U.S. in that year was the greatest determining factor in expansion in coupon advertising, for example, and retraction in auto dealer advertising. But overall newspapers racked-up a solid 12% rise in national space — expanding well in excess of newspaper rate rises. Presented here is the first release of Media Records measurements of newspaper usage by national advertisers in 1980. Included are brand leaders, category totals, the leading spenders.

1980 Brand leaders in newspapers

National newspaper advertising dollar volume rose another 13% in 1980 — following a year in which volume was up 17%.

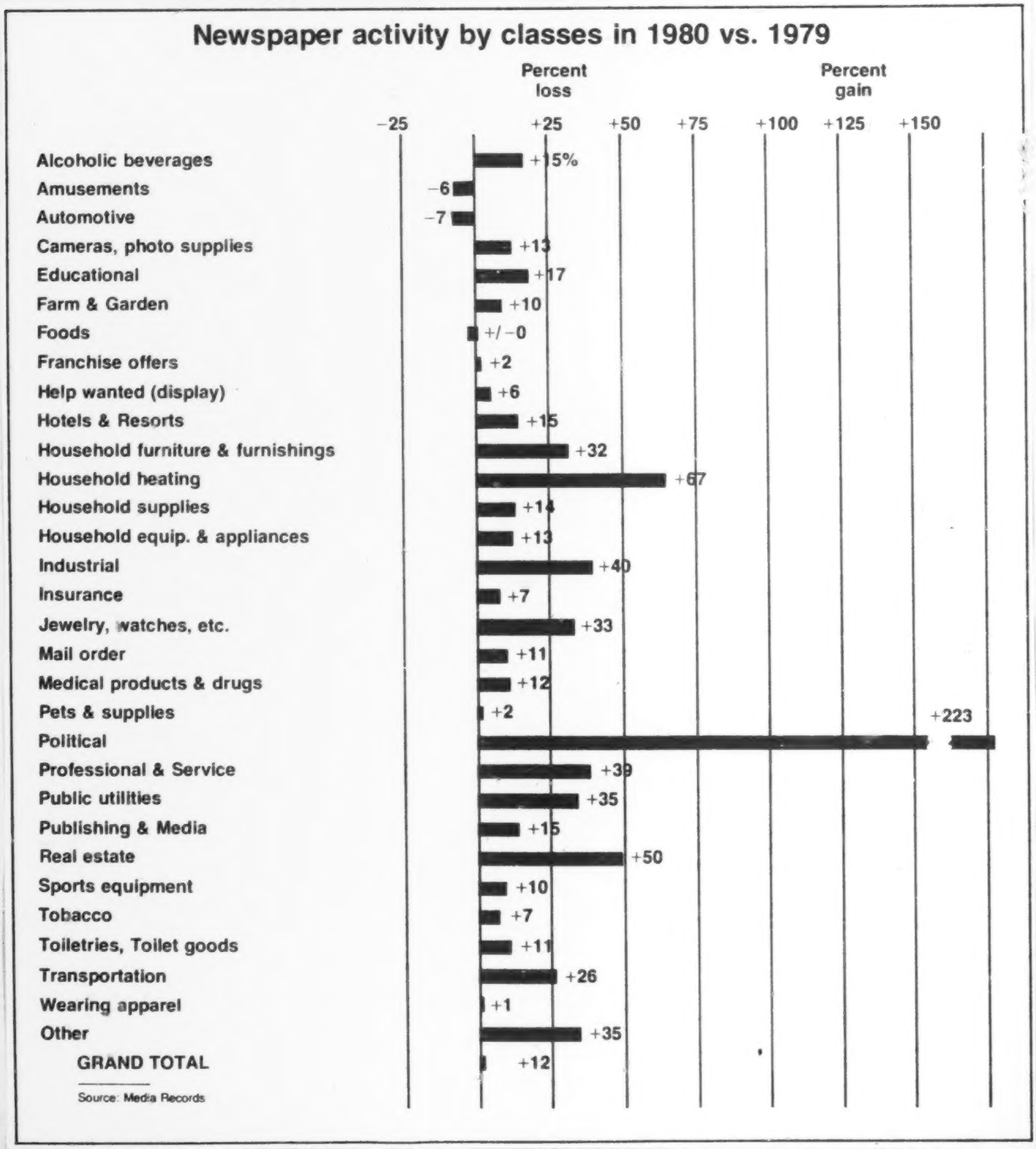
The total figure for 1980, as measured by Media Records, Inc. ran well past the $2 billion mark for the first time — hitting $2,184,126,000. In 1979, the Media Records estimate was $1,950,374,000.

The leading categories continued to be automotive, tobacco, transportation, foods and publishing. Expenditures by magazines and radio and tv stations continue to grow at an especially rapid rate.

The brands benefitting from the largest increases in national newspaper ad dollars were in this order: Vantage cigarettes, Eastern Airlines, the big couponers (Valassis and John Blair), General Electric, NBC stations, Franklin Mint's mail order items, Sony recorders, Coors beer, P&G general promotion and Xerox office equipment.

These are the top-liners in the new report from MR.

The data that follow are published


Newspaper activity by classes in 1980 vs. 1979

Source: Media Records

exclusively by *Marketing & Media Decisions* under an arrangement with Media Records, Inc. What we show, however, is just the tip of the iceberg — activity among the leaders. The full report is available from Media Records, 370 Seventh Ave., New York, N.Y. 10017 for $775. Product classification cost reports range from a high of $230 for a complete class breakout (foods, for example) down to $80 for a food sub-class.

The report is presented in four parts (in one volume): classification totals, 100 leaders with corporate totals, 100 leaders with brand breakouts, and brand breakouts by product class.

Our latest analysis of increases in media costs (*Decisions*, August 1980) showed that newspapers had a space-cost increase in 1980 of 9% over 1979. Considering the 12% increase in national revenue, the implication is that in 1980 there was a *real* gain in physical volume — the actual space purchased at the national rate by major brand advertisers.

More coupons than ever

Among the trends the new Media Records report shows is the growing use of coupon advertising in newspapers. The seven leading co-op couponers as a group in 1980 bought $39,380,000 worth of space. Valassis maintained its lead with an expenditure of $13,456,000 in 1980 compared to $9,791,000 the year before. Then came John Blair with an increase from $7,929,000 in 1979 to $11,666,000 in 1980. And in third place was Sunday Comics Couponing Corp. with $10,685,000 in 1980 compared to $4,938,000 in 1979.

Marketing Corporation of America, Westport, Conn.— a relative newcomer but growing fast in co-op couponing — spent $2,677,000 in 1980. Next year Marketing Corp. and its subsidiary Newspaper Co-op Couponing will show even larger investments, including its series of frozen foods promotions that are running $4 million at a clip several times a year in papers across the country.

A. C. Nielsen Clearing House, the coupon redemption specialist, reports that co-op newspaper couponing in newspapers rose to 17.1% of total coupons distributed in 1980 from 16.1% in 1979. Nielsen also reports that over 75% of some 90 billion coupons distributed in 1980 were in newspapers either as co-ops, free-standing inserts, on-page in individual ads of [illegible] Sunday papers.

The total number of coupons distributed in newspapers jumped from 62 billion in 1979 to 68 billion in 1980 — up 9.5%. Coupon distribution by newspapers in 1976 was only about 35 billion; in five years coupon distribution in newspapers has almost doubled.

Corporate ads by the Generals

Another category that now looms large in national newspaper space is corporate/general advertising. The five leaders in 1980 are: General Motors, spending $4,444,000; General Electric with $2,941,000; General Foods at $1,318,000; Procter & Gamble, the great advocate of television, at $2,362,000 in newspapers; and Johnson & Johnson with $1,369,000. The general budgets of these five in newspapers ran $12,431,000 in 1980 — up 15% over the year before.

Big business of betting

Lotteries are a new good customer of national newspaper salesmen. New York gave them $2,247,000 to display the virtues of betting on the races in that state in 1980. Michigan added another $1,148,000. The next big spenders were lotteries in Pennsylvania ($668,000), Massachusetts ($513,000), Illinois ($337,000), New Jersey $326,000). Race track come-ons in these six states enriched the newspapers by $5,239,000.

Here's how the leading brands in the more standard newspaper classifications looked in 1980:

Cigarettes

Individual cigarette brands continued to be the largest brand spenders in national newspaper space. Salem topped the list with almost $30 million in 1980 — a $3.2 million increase over the year before, which moved it up to first place over Kent, last year's leader. Kent cut back its newspaper dollars by $4 million, dropping below third place. Second place went to Merit at over $29 million. Third place went to Vantage, which suddenly opened up with an additional $10 million over its 1979 investments in the medium.

The other big spending smokes were Kent at $26.5 million, Now at $19.5 million, Marlboro $17.3 million, Cambridge $16.5 million, Winston $11.5 million and Carlton $10.7 million. Kool coasted at a mere $3.8 million in newspapers.

Marketing strategy among the smoke merchants was to puff-up their specialty line extensions. And that's where they put the most dollars — behind 100's, lights, menthols, ultra menthols, ultra lights, ultra light 100's.

Passenger cars

Chevrolet nosed out Ford as a newspaper spender in 1979, then increased its lead in the daily and Sunday press in 1980. Both companies cut back in total dollars, but Chevrolet was still spending close to $18.8 million, while Ford was down under $15.2 million. The Chrysler comeback in advertising moved it up into third place at almost $12.7 million — almost four times what it spend in 1979. Ford's cut back shifted it down below newspaper dollar expenditures in the previous three years.

Chevrolet's new strength was in local dealer advertising; $12.8 million of its dollars were spent at the local level. Ford's dollars were pretty well distributed through factory expenditures, dealer association ante's and locally. More than three-fourth's of Chrysler's dollars were factory.

Other automotives that depended for their presence in newspapers on local dealer advertising more than anything else were Cadillac, Pontiac, Buick, Olds and Dodge.

The individual model out of Detroit that got the biggest push from the factory was Chevrolet's Malibu, $2.7 million in newspapers.

The imports in highest gear in newspapers were in this order: Toyota $6.8 million, Datsun $6.5 million, BMW $4.8 million, Volvo $4.1 million, Saab $3.7 million, Honda $2.9 million, Peugeot $2.5 million, Mercedes Benz $2.4 million, Audi $2.2 million and Volkswagen $2.2 million. Those are the top ten. Their combined newspaper ad dollars in 1980 add up to $38.1 million.

Among the imports there is considerable variation in the ratios of factory/dealer dollars. Dealer association dollars are either non-existent or small. Toyota, Datsun and Mercedes Benz tend to match dealer dollars with their own. Volkswagen and Honda rely mostly on dealer expenditures in newspapers. Volvo, BMW, Audi, Peugeot and Saab dominate newspaper spending direct from their U.S. headquarters.

Total expenditures in newspapers by the imports vs. the domestics places the imports at less than half the domestics' use of newspapers, but the gap is closing some — and the imports tend to concentrate their dollars in their best markets — usually the East and West Coasts. Top ten domestics put $88.6 million in newspapers in 1980 compared to the $38.1 million of the top ten imports.

Airlines

Deregulation of the airlines inspired a more competitive stance in newspapers by most major domestic air carriers. The leaders in 1980 were Delta at $18.3 million, Eastern at $16.6 million and American at $14.7 million. Eastern added the most to its budget — $3.4 million — replacing United as one of the top three. This is the second year in a row that United has reduced its newspaper usage.

Expenditures by five leading chains in newspapers in 1980 (in millions)

Sears	$330
J.C. Penney	200
Wards	132
K-Mart	230
Woolco	124

Sources: PIB, LNA, NAB, MPA, TvB, NAB, RAB, Media Records, industry estimates

Other domestics with soaring budgets in newspapers in 1980 were: TWA at $12.4 million, Braniff at $2.3 million, Continental at $3.2 million, Hughes Air West at $1.6 million, Republic at $3.8 million, Pan Am in behalf of services within the U.S. at $2.1 million.

Pan Am was also the largest advertiser in the U.S. for overseas flights — putting an additional $5.2 million into U.S. newspapers for that service. Close behind on trans-oceanic flight advertising was TWA at $5.1 million. Then came Eastern and United with $3.2 million each in newspaper backing for overseas travel.

A dozen other internationals spent $1 million or more in newspapers in 1980: Air Canada, Air France, American, Braniff, British Airways, Continental, Delta, KLM, Mexicana, Northwest Orient, Western, World Airways.

Liquors

Seagrams, which a few years ago caused a stir by switching heavily into magazines, redeemed itself in the eyes of newspaper salesmen in 1980. It upped its newspaper budget from $3.3 million in 1979 to $4.4 million in 1980. Calvert was the second largest liquor advertiser in 1980, but its trend was the reverse of Seagrams. Calvert dropped from $3.7 million in 1979 to $2.9 million in 1980. Third place Kessler was at $2.4 million in 1980 — slightly below its figure of $2.8 million in 1979.

Others putting $1 million or more behind liquor brands in newspapers were: Beefeater and Burnett gins, Dimitri and Finlandia vodkas, Heublein cocktail mixes, Southern Comfort, Wild Turkey and Windsor Supreme whiskeys.

The wine and beers chose to put their big bucks into tv and radio. Largest beers were Coors ($604,000), Lowenbrau ($521,000) and Busch ($492,000). Leading wines in newspapers were: Monterey Vineyards ($417,000), Gallo ($345,000), Dry Sack ($332,000).

Gas and oil

Leading gas and oil companies stepped up their use of newspapers considerably in 1980, largely for advocacy advertising. They found their communications needs required clear explanations of their drive to become independent of Middle East oil and advice to the public on how to conserve energy of all kinds.

Mobil had moved its newspaper dollars up from $4.1 million in 1978 to $5.6 million in 1979 — and inched it up slightly above that in 1980. Chevron moved up from $16,000 in 1978 to $2.9 million in 1979 and to $3.2 million in 1980. Texaco moved up from $606,000 in 1978 to $1.1 million in 1979 and to almost $3 million in 1980. Those were the big three oil/gas advertisers in newspapers in 1980.

Others in the million-dollar-newspaper club in 1980 were Exxon at $2.6 million, Gulf at $2.5 million and Atlantic Richfield at $1.4 million.

Radio/tv stations, magazines, books

The broadcasters are turning to newspapers as never before to build audience and image as they jostle for position as number one in the ratings books. NBC spent $15 million in newspapers in 1980 — up from $12.8 million in 1979. ABC invested $11.8 million in the daily and Sunday press, CBS $7.9 million in 1980. Their relative standing in expenditures in newspapers is indicative of their need to out-advertise the competition — and grab the ratings.

A sign of the times in this listing is the appearance as strong newspaper advertisers of pay tv and subscription tv services: Home Box Office at $1.5 million in 1980, Wometco Home Theatre at $1.2 million, ON-TV at $1.1 million. Other over $1 million advertisers are Public Broadcasting Service ($1.1 million) and Radio & Tv Log ($2.4 million). All of them are after their share of attention on the broadcast programing pages of the papers.

The other big media category in newspapers is magazines. Leading the list in 1980 were *Time* at $2 million, *Sports Illustrated* at $1.2 million and *Newsweek* at $638,000.

Time-Life was also the largest book advertiser in newspapers in 1980, with an investment of $2.4 million — up from $773,000 the year before. Time-Life moved ahead of Book-of-the-Month at $1.7 million and Doubleday at $1.3 million.

Mail order

The leaders in mail order continued to lead the pack in their use of newspapers in 1980 — in the same order and each of them with increased budgets: Franklin Mint at $8.3 million, Spencer Gifts at $6.5 million, Mail Box U.S.A. at $2.1 million.

Other advertisers of coin collections through the mail were also big in newspapers: The Columbia Mint at $1.7 million, Historic Providence Mint at $1.1 million, International Monetary Mint at $$1.1 million. Add to these as million-dollar-newspaper spenders in mail order: Walter Drake ($1.6 million), Old Village Shop ($1.5 million), Shopping Mart ($1.6 million).

Tours and travel

The second largest group of travel advertisers (after the airlines) in newspapers are the steamship lines. Holland America added $1.5 million to its tourist trade promotions in the daily and Sunday press, bringing its total to $4.6 million in 1980. In second place was Cunard with an investment of $3.6 million, then Princess Cruises at $2.5 million.

Newspapers also benefitted from seven other cruise advertisers spending a million or more: Commodore Cruise Line (which doubled its budget), Costa (a long-time newspaper user), Home, Norwegian Carribean, Royal Carribean (which jumped its dollars from $975,000 to $2.4 million), Royal Viking and Sitmar (another long-time user of newspaper ads to fill its berths).

The travel services themselves were also active with larger budgets in 1980. Leading the list were: American Express and Liberty Travel at $2.2 million each. Number three was a relative newcomer to newspapers, Thomson Vacations — up from $237,000 in 1979 to $1.6 million in 1980.

Auto lease/rentals

The vehicle renting business has two giants in use of newspaper space: Potamkin Lease at $2.4 million and Jartran Truck at $2.9 million. Largest spender, however, is still Hertz at $4.6 million.

Hertz outspent its major competitors in newspapers. Avis invested $1.3 million, National $1.2 million, Dollar Rent-a-car only $59,000 nationally.

Foods

Trends in newspaper use by packaged food brands was mixed in 1980. Pepperidge Farms and Pillsbury both cut back in their baked goods advertising. Kellogg's cut about $800,000 out of its considerable cereal budget in newspapers (it was still at $3.3 million). Kraft increased its use of newspapers for condiments; Heinz and Del Monte each halved their outlays (which had been at the $1 million level in 1979). The only really large user among the candy manufacturers was M&M/Mars, which upped its dollars to $2.5 million.

Kraft also got bigger in dairy product promotion, topping the list in that category at $1.1 million in 1980. Green Giant tripled its budget in 1980 to become the most aggressive among fruit and vegetable advertisers, spending $1 million.

Hormel stayed dominant in meats/fish/poultry by increasing newspaper dollars to $2.2 million. In second place was Perdue chicken products at $1 million (about $200,000 less than the year before). Swanson made a strong showing in prepared dishes, jumping from $159,000 in 1979 to $1.2 million in 1980. The three leaders in prepared foods in 1979 became very small in 1980 (Chun King, Chef Boy-ar-dee and Jeno). Parkay and Sunlit-Oil continued to be most important among the shortenings. ■

To reach Seattle's most affluent, discerning audience, talk to the Post-Intelligencer. Because we reach Seattle before business. Before pleasure. Before anything. We spend our day selling to the nation's 15th largest market. That's up from 17 two years ago. Every morning we catch the eye of almost half a million readers. And our audience is better informed, more discerning, and making more money than the readers of Seattle's other daily.

So plug into the Post-Intelligencer. And state your case first thing in the morning.

NewsPlan rates and standard advertising units available. Source: 1980 Belden Market Study.

In Seattle, we're the first thing in the morning.

Seattle Post-Intelligencer
Good morning, Seattle
INSIDE
Design helps reader
Early bird gets bonus every day

NATIONAL ADVERTISING INVESTMENTS IN NEWSPAPERS IN 1980-1979

By classification, projected to U.S. totals by Media Records

Classification	1980	1979	Gain or loss
Alcoholic Beverages	**$ 102,850,000**	**$ 89,175,000**	**+15.3**
Beers	9,474,000	8,869,000	+6.8
Wines	6,868,000	5,059,000	+35.8
Liquors	86,508,000	75,247,000	+15.0
Amusements	**11,767,000**	**12,555,000**	**−6.3**
Automotive	**313,119,000**	**336,935,000**	**−7.1**
Gasoline & Oil Companies	30,162,000	27,252,000	+10.7
Leasing & Rentals	34,658,000	33,745,000	+2.7
Parts, Accessories & Supplies	8,067,000	9,181,000	−12.1
Passenger Cars (New)	226,236,000	248,733,000	−9.0
Trucks, Trailers & Mobile Homes	12,590,000	16,428,000	−23.4
Automotive Not Elsewhere Classified	1,406,000	1,596,000	−11.9
Cameras, Photo Supplies & Services	**14,923,000**	**13,203,000**	**+13.0**
Educational	**24,510,000**	**20,805,000**	**+17.8**
Farm & Garden	**29,708,000**	**26,976,000**	**+10.1**
Foods	**166,347,000**	**167,481,000**	**−0.7**
Baby Foods	172,000	566,000	−69.6
Bakery Goods	11,807,000	13,268,000	−11.0
Baking Mixes, Flour & Ingredients	1,948,000	4,148,000	−53.0
Beverages	35,960,000	41,037,000	−12.4
Coffee	10,706,000	14,237,000	−24.8
Tea	1,726,000	2,557,000	−32.5
Fruit & Vegetable Juices	4,950,000	5,099,000	−2.9
Soft Drinks-Carbonated-Diet	2,174,000	1,231,000	+76.6
Soft Drinks-Carbonated-Non Diet	9,413,000	9,143,000	+3.0
Miscellaneous Beverages	6,991,000	8,770,000	−20.3
Cereals	5,342,000	6,905,000	−22.6
Condiments	8,173,000	9,456,000	−13.6
Confectionery & Snacks	11,171,000	8,351,000	+33.8
Dairy Products	17,487,000	11,926,000	+46.6
Desserts & Dessert Ingredients	2,356,000	1,759,000	+33.9
Fruits & Vegetables	9,639,000	8,655,000	+11.4
Macaroni Products-Uncooked	1,447,000	982,000	+47.4
Meats, Fish & Poultry	19,500,000	21,643,000	−9.9
Prepared Dinners & Dishes	10,865,000	9,750,000	+11.4
Shortenings, Oils & Margarines	9,846,000	8,677,000	+13.5
Soups	1,962,000	3,588,000	−45.3
Sugars, Syrups & Jellies	2,003,000	1,769,000	+13.2
Miscellaneous Foods	16,669,000	15,001,000	+11.1
Franchise Offers	**5,349,000**	**5,257,000**	**+1.8**
Help Wanted	**58,688,000**	**55,156,000**	**+6.4**

CLASSIFICATION TOTALS (continued)

Classification	1980	1979	Gain or loss
Hotels & Resorts	**$ 78,289,000**	**$ 67,871,000**	**+15.3%**
Hotels, Motels, & Resorts	49,128,000	39,999,000	+22.8
Resort Area Development	29,161,000	27,872,000	+4.6
Household Furniture & Furnishings	**13,131,000**	**9,941,000**	**+32.1**
Floor Coverings	2,776,000	2,869,000	−3.2
Furnishings	7,138,000	3,914,000	+82.4
Furniture	3,217,000	3,158,000	+1.9
Household Heating & Home Heating Equipment	**13,272,000**	**7,960,000**	**+66.7**
Electric, Gas & Oil Suppliers	4,770,000	3,503,000	+36.2
Heating & Plumbing Equipment	8,502,000	4,457,000	+90.8
Household Supplies	**41,775,000**	**36,561,000**	**+14.3**
Aluminum & Paper Products	7,851,000	8,280,000	−5.2
Disinfectants & Insecticides	3,149,000	3,111,000	+1.2
Home Building Materials & Tools	10,517,000	7,279,000	+44.5
Paints, Wall Coverings & Other Finishes	4,646,000	3,241,000	+43.4
Soaps, Cleansers & Polishes	9,805,000	9,978,000	−1.7
Miscellaneous Household Supplies	5,807,000	4,672,000	+24.3
Household Equipment & Appliances	**53,022,000**	**46,697,000**	**+13.5**
Air Conditioning	3,247,000	3,549,000	−8.5
Phonographs, Records, Tapes & Recorders	13,344,000	9,470,000	+40.9
Radio & TV Sets	10,300,000	10,526,000	−2.1
Ranges, Stoves & Dishwashers	4,884,000	4,880,000	+0.1
Refrigerators & Freezers	670,000	618,000	+8.4
Small Electrical Appliances	2,644,000	4,345,000	−39.1
Washers & Dryers	1,024,000	1,376,000	−25.6
Miscellaneous Household Equipment & Appl	16,909,000	11,933,000	+41.7
Industrial	**40,725,000**	**28,987,000**	**+40.5**
Aircraft & Equipment	1,862,000	1,910,000	−2.5
Industrial Area Development	2,351,000	2,372,000	−0.9
Office Equipment & Stationery Supplies	19,624,000	9,502,000	+106.5
Industrial Materials & Machinery	8,937,000	8,129,000	+9.9
Miscellaneous Industrial	7,951,000	7,074,000	+12.4
Insurance	**36,399,000**	**34,022,000**	**+7.0**
Life, Health & Medical	31,142,000	31,363,000	−0.7
Fire, Casualty & Other	5,257,000	2,659,000	+97.7
Jewelry, Watches & Silverware	**8,085,000**	**6,082,000**	**+32.9**
Mail Order	**60,631,000**	**54,420,000**	**+11.4**
Medical Products & Drugs	**22,893,000**	**20,374,000**	**+12.4**
Cold, Cough & Sinus Remedies	992,000	1,003,000	−1.1
Digestive Aids & Laxatives	469,000	565,000	−17.0
Headache Remedies & Sedatives	368,000	2,367,000	−84.5
Vitamins, Tonics & Reducing Aids	11,338,000	9,960,000	+13.8
Medicated Skin Products	4,903,000	1,021,000	+380.2
Miscellaneous Medical Products & Drugs	4,823,000	5,458,000	−11.6

CLASSIFICATION TOTALS (continued)

Classification	1980	1979	Gain or loss
Pets & Pet Supplies	**$ 8,916,000**	**$ 9,153,000**	**−2.6%**
Pet Foods	7,964,000	8,086,000	−1.5
Pets & Pet Supplies	952,000	1,067,000	−10.8
Political	**26,705,000**	**8,256,000**	**+223.5**
Professional & Service	**8,967,000**	**6,435,000**	**+39.3**
Public Service Utilities & Communications	**50,595,000**	**37,570,000**	**+34.7**
Publishing & Media	**177,650,000**	**154,851,000**	**+14.7**
Books	32,823,000	32,173,000	+2.0
Magazines	19,711,000	17,194,000	+14.5
Newspapers	2,711,000	2,544,000	+6.6
Radio & TV Stations	122,405,000	102,940,000	+18.9
Real Estate	**16,483,000**	**11,002,000**	**+49.8**
Sporting & Leisure Time Equipment	**7,568,000**	**6,905,000**	**+9.6**
Sporting Goods	3,904,000	4,060,000	−3.8
Boats & Equipment	601,000	1,119,000	−46.3
Hobbies, Toys & Games	3,063,000	1,726,000	+77.5
Tobacco	**313,773,000**	**293,661,000**	**+6.8**
Cigars	1,372,000	1,138,000	+20.6
Cigarettes	310,604,000	288,672,000	+7.6
Tobacco & Smoking Accessories	1,797,000	3,851,000	−53.3
Toiletries & Toilet Goods	**30,901,000**	**27,946,000**	**+10.6**
Cosmetics, Make-Up & Manicure Products	4,041,000	4,755,000	−15.0
Dental Supplies & Mouthwashes	4,616,000	4,348,000	+6.2
Feminine Hygienic Products	4,842,000	2,882,000	+68.0
Men's Toiletries & Hair Products	3,337,000	1,400,000	+138.4
Men's & Women's Shaving Equipment	2,087,000	2,270,000	−8.1
Perfumes & Toilet Water	1,614,000	1,820,000	−11.3
Toilet Soaps, Bath Powders & Deodorants	2,245,000	3,889,000	−42.3
Women's Hair Products & Treatments	1,360,000	1,725,000	−21.2
Miscellaneous Toiletries & Toilet Goods	6,759,000	4,857,000	+39.2
Transportation	**296,790,000**	**235,456,000**	**+26.0**
Airlines	186,793,000	147,591,000	+26.6
Domestic	121,953,000	94,184,000	+29.5
International	63,343,000	52,038,000	+21.7
Cargo	1,497,000	1,369,000	+9.3
Bus Lines	5,279,000	3,417,000	+54.5
Railroads	4,590,000	6,518,000	−29.6
Steamships	34,699,000	23,806,000	+45.8
Tours & Travel Service	59,108,000	49,906,000	+18.4
Miscellaneous Transportation	6,321,000	4,218,000	+49.9
Wearing Apparel	**31,423,000**	**31,235,000**	**+0.6**
General Not Elsewhere Classified	**118,872,000**	**87,446,000**	**+35.9**
Grand Total	**$2,184,126,000**	**$1,950,374,000**	**+12.0**

Newspaper advertising investments by top 100 newspaper users in 1979-80

Rank	1980 Investments	1979 Investments
1. Reynolds, R. J. Industries, Inc.	$113,099,000	$ 87,992,000
2. Morris, Philip Co.	77,624,000	59,703,000
3. General Motors Corp.	52,209,000	69,871,000
4. Loews Corp.	45,624,000	32,665,000
5. RCA Corporation	25,122,000	22,645,000
6. Ford Motor Co.	24,380,000	32,329,000
7. Chrysler Corp.	21,321,000	22,765,000
8. Delta Airlines, Inc.	20,410,000	18,117,000
9. Eastern Airlines, Inc.	20,161,000	12,568,000
10. American Telephone & Telegraph Co.	19,181,000	14,951,000
11. Seagram, Joseph E & Sons, Inc.	18,043,000	16,821,000
12. Trans World Airlines, Inc.	17,546,000	11,005,000
13. American Airlines, Inc.	17,478,000	14,951,000
14. American Brands Inc.	16,817,000	21,102,000
15. United Airlines	16,245,000	13,315,000
16. Columbia Broadcasting System	14,969,000	13,676,000
17. Pan American World Airways	13,902,000	5,152,000
18. British American Tobacco., Ltd.	13,645,000	25,333,000
19. General Electric Co.	12,128,000	9,130,000
20. American Broadcasting Companies, Inc.	11,900,000	10,892,000
21. Time, Inc.	10,901,000	6,273,000
22. General Foods Corp.	9,713,000	8,904,000
23. Franklin Mint Inc.	8,749,000	6,988,000
24. Procter & Gamble Co.	7,976,000	10,031,000
25. U. S. Government	7,287,000	2,979,000
26. MCA INC.	7,090,000	7,157,000
27. Toyota Motor Co., Ltd.	7,023,000	8,487,000
28. Nissan Motor Corp., USA	6,870,000	8,398,000
29. Rapid-American Corp.	6,863,000	7,474,000
30. Dart & Kraft Inc.	6,683,000	5,451,000
31. Mobil Oil Corp.	5,923,000	5,775,000
32. Sony Corp. of America	5,758,000	2,873,000
33. Norton Simon Inc.	5,462,000	7,146,000
34. Coca-Cola Co., The	5,418,000	4,711,000
35. Hanover House Industries, Inc.	5,138,000	4,459,000
36. Johnson & Johnson	5,059,000	2,689,000
37. Heublein, Inc.	5,056,000	3,092,000
38. Braniff International Airlines	5,029,000	7,915,000
39. World Airways, Inc.	5,011,000	589,000*
40. Volkswagen Of America, Inc.	4,949,000	2,304,000
41. Bavarian Motor Works	4,836,000	3,549,000
42. Continental Airlines, Inc.	4,741,000	4,576,000
43. Holland America Cruise	4,555,000	3,617,000
44. Nelson Doubleday Inc.	4,334,000	4,710,000
45. Northwest Orient Airlines	4,297,000	3,462,000
46. Volvo Of America Corp.	4,204,000	3,505,000
47. Kellogg Co.	4,175,000	4,830,000
48. International Telephone & Telegraph Co.	4,112,000	2,592,000
49. Republic Airlines Inc.	4,104,000	1,830,000
50. Nestle Enterprises	4,027,000	3,291,000*
51. Standard Brands, Inc.	$ 3,816,000	$ 1,406,000*
52. Liggett Group Inc.	3,775,000	8,910,000
53. Saab Scania Of America, Inc.	3,703,000	4,357,000
54. Chevron U. S. A. Inc.	3,691,000	3,354,000
55. Cunard Line, Ltd.	3,619,000	2,159,000
56. Union Carbide Corp.	3,496,000	2,402,000
57. General Mills Inc.	3,414,000	4,402,000
58. Western Airlines, Inc.	3,309,000	5,313,000
59. Eastman Kodak Co.	3,245,000	2,090,000
60. Gulf & Western	3,229,000	2,466,000
61. Honda Motor Co., Ltd.	3,194,000	1,816,000
62. Frost Company	3,160,000	3,068,000
63. Xerox Corp.	3,103,000	1,476,000*
64. Pillsbury Co.	3,056,000	2,250,000*
65. Texaco Inc.	2,956,000	1,143,000*
66. Exxon Corp.	2,884,000	3,808,000*
67. Jartran Truck Rental	2,878,000	365,000*
68. International Business Machines Corp.	2,843,000	1,621,000*
69. Warner-Lambert Co.	2,829,000	1,356,000*
70. American Express Co.	2,797,000	2,552,000
71. Campbell Soup Co.	2,781,000	3,374,000
72. Mars, Inc.	2,781,000	2,401,000
73. New York State Government	2,766,000	2,354,000
74. Brown-Forman Distillers Corp.	2,737,000	3,306,000
75. Bristol-Myers Co.	2,631,000	2,321,000
76. Walker-Gooderham & Worts	2,627,000	2,837,000
77. British Airways Corp.	2,614,000	2,972,000
78. Princess Cruises, Inc.	2,597,000	2,187,000*
79. Government Employees Insurance Co.	2,594,000	2,300,000
80. Heinz, H. J. Co.	2,570,000	2,826,000
81. U. S. Air	2,549,000	345,000*
82. Beatrice Foods Co.	2,545,000	2,765,000
83. Peugeot Motors Of America Inc.	2,545,000	3,012,000
84. Gulf Oil Corp.	2,539,000	1,629,000*
85. United Technologies Corp.	2,477,000	248,000
86. Mercedes-Benz Of North America, Inc.	2,431,000	1,466,000*
87. Royal Caribbean Cruise Line	2,420,000	975,000*
88. National Distillers & Chemical Corp.	2,414,000	1,445,000*
89. Zenith Radio Corp.	2,366,000	2,506,000
90. Fiat Motors Of North America Inc.	2,341,000	1,951,000
91. Hormel, George A. & Co.	2,309,000	2,237,000
92. Edison Electric Institute	2,303,000	194,000*
93. House Of Wesley Inc.	2,282,000	2,608,000
94. Greyhound Corp.	2,252,000	2,574,000
95. Whirlpool Corp.	2,249,000	2,245,000
96. Carnation Co.	2,198,000	2,145,000
97. Ralston Purina Co.	2,185,000	1,322,000*
98. Scott Paper Co.	2,158,000	2,242,000
99. Liberty Travel Inc.	2,155,000	1,618,000*
100. Dow Chemical Co.	2,117,000	696,000*
Total top 100 newspaper advertisers	**$885,680,000**	**$782,047,000***

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* Corporate totals for 1979 compiled by M&MD from information developed by Media Records, Inc.

Top brand spenders in national newspaper space

- **Leading classifications in national newspaper spending**
- **The three brands spending the most in these classifications**
- **Dollar investments for 1980, 1979, 1978, 1977**

The data that follow have been extracted from Media Records 1980, four-part National Newspaper Advertising Investments report. Part 1 shows national advertising investments in Media Records product classifications. Part 2 ranks the top 100 national newspaper advertisers by corporate name. Part 3 breaks down these numbers by brands or services of the top 100 corporations, plus the newspaper expenditure for each product or service. Part 4 shows brands and products arranged alphabetically in each of the classifications presented in Part 1.

The figures for total advertising by classification have been projected to national totals. Not so with the numbers for individual brands. The latter are based on the Media Records sample of observed usage of newspapers, projected to the leading 125 markets that account for an estimated 82% of the total U.S. national newspaper advertising volume.

From Part 4 (classification by brand) we have determined the top three brands and in the following tabulation show their investments for the past four years.

	1980	1979	1978	1977
Airlines				
Delta	$18,308,000	$17,907,000	$15,977,000	$16,835,000
Eastern	16,632,000	9,371,000	11,081,000	11,464,000
American	14,673,000	12,706,000	10,243,000	11,809,000
Aluminum/paper products				
Scott	1,103,000	1,345,000	1,199,000	843,000
Kleenex	574,000	312,000	520,000	385,000
Viva Towels	257,000	357,000	728,000	196,000
Amusements				
Paramount	1,290,000	1,187,000	236,000	36,000
Great Adventure	342,000	226,000	127,000	203,000
Superdome	264,000	—	—	—
Auto lease/rental				
Hertz	4,550,000	4,366,000	2,365,000	1,073,000
Potamkin Lease	2,373,000	859,000	628,000	967,000
Jartran Truck	2,901,000	365,000	—	—
Auto parts/accessories				
Prestone products	838,000	620,000	737,000	482,000
Champion plugs	546,000	333,000	185,000	189,000
Polyglycoat	377,000	327,000	180,000	183,000
Automobiles				
Chevrolet	18,780,000	21,825,000	17,528,000	16,564,000
Ford	15,199,000	21,771,000	19,579,000	16,788,000
Chrysler	12,675,000	357,000	6,843,000	7,209,000
Bakery goods				
Pepperidge Farms	651,000	955,000	915,000	832,000
Pillsbury	487,000	683,000	468,000	649,000
Sunshine	473,000	269,000	253,000	686,000

Estimates prepared by Media Records in 125 markets representing 82% of U.S. total

Top brand spenders in newspaper space (cont.)

	1980	1979	1978	1977
Beers				
Coors	$ 604,000	$ 415,000	$ 722,000	$ 390,000
Lowenbrau	521,000	276,000	199,000	713,000
Busch	492,000	625,000	202,000	—
Beverages (food)				
Maxwell House	2,032,000	1,966,000	2,537,000	2,186,000
Seven Up	1,993,000	2,469,000	255,000	406,000
Hawaiian Punch	1,857,000	1,572,000	834,000	—
Books				
Time-Life	2,371,000	773,000	623,000	395,000
Book-of-the-Month	1,748,000	1,768,000	1,500,000	1,423,000
Doubleday	1,277,000	1,538,000	1,076,000	1,039,000
Bus lines				
Greyhound	838,000	526,000	2,051,000	749,000
Continental	686,000	77,000	398,000	1,327,000
Trailways	620,000	—	—	—
Cameras/photo supplies				
Kodak	3,180,000	1,975,000	2,432,000	3,572,000
Minolta	1,008,000	457,000	144,000	97,000
Polaroid	900,000	2,420,000	2,522,000	1,878,000
Cereals				
Kellogg's	3,263,000	4,011,000	4,226,000	2,664,000
General Mills cereals	335,000	314,000	164,000	289,000
Post	269,000	376,000	192,000	127,000
Cigarettes				
Salem	29,853,000	16,661,000	14,150,000	7,379,000
Merit	29,141,000	26,886,000	20,507,000	23,763,000
Vantage	27,196,000	16,522,000	14,427,000	16,704,000
Kent	26,498,000	30,459,000	19,790,000	15,846,000
Condiments				
Kraft	1,048,000	884,000	3,394,000	3,876,000
Heinz	551,000	1,105,000	1,350,000	454,000
Del Monte	437,000	1,277,000	249,000	325,000
Confectionery/snacks				
M&M/Mars	2,528,000	1,688,000	485,000	1,271,000
Freshen Up	727,000	—	101,000	—
Planters Nuts	581,000	171,000	335,000	383,000
Couponers				
Valassis	13,456,000	9,791,000	6,212,000	4,123,000
John Blair	11,666,000	7,929,000	5,921,000	4,227,000
Sun. Comics	10,685,000	4,938,000	—	—
Dairy products				
Kraft cheese	1,119,000	694,000	1,750,000	1,245,000
Calif. Milk Advisory Bd.	805,000	509,000	252,000	75,000
Butter Buds	652,000	64,000	—	—

Estimates prepared by Media Records in 125 markets representing 82% of U.S. total

Top brand spenders in newspaper space (cont.)

	1980	1979	1978	1977
Dental supplies/mouthwashes				
Velamints	$ 535,000	$ 91,000	—	—
Lever Bros. products	432,000	256,000	—	—
Listerine	417,000	15,000	$ 50,000	—
Farm & garden				
Toro	1,950,000	1,880,000	1,651,000	$ 1,152,000
Snapper	1,815,000	1,619,000	1,472,000	965,000
Scott	1,795,000	1,467,000	198,000	105,000
Floor coverings				
Armstrong	698,000	1,294,000	925,000	478,000
Lees carpets	639,000	646,000	274,000	210,000
Congoleum	372,000	130,000	144,000	286,000
Foods (miscellaneous)				
Kraft	1,738,000	1,739,000	484,000	929,000
General Foods	1,318,000	486,000	38,000	6,000
Carnation	834,000	632,000	259,000	5,000
Fruits/vegetables				
Green Giant products	1,027,000	301,000	463,000	626,000
Del Monte	564,000	271,000	43,000	36,000
Florida products	461,000	442,000	117,000	28,000
Gas/oil				
Mobil	5,631,000	5,619,000	4,130,000	5,484,000
Chevron	3,245,000	2,874,000	16,000	—
Texaco	2,956,000	1,143,000	606,000	1,259,000
Home building materials/tools				
Armstrong	909,000	948,000	696,000	151,000
Gold Bond	564,000	363,000	11,000	—
Owens Corning	533,000	179,000	36,000	331,000
Household equipment (miscellaneous)				
G-E	6,506,000	3,089,000	4,280,000	4,177,000
Maytag	1,339,000	276,000	654,000	557,000
Whirlpool	1,166,000	2,232,000	1,610,000	1,499,000
Insurance — life/medical				
Blue Cross/Shield	5,574,000	3,806,000	3,471,000	3,292,000
National Home Life	1,894,000	1,800,000	1,993,000	1,702,000
New York Life	1,214,000	1,129,000	1,010,000	714,000
Jewelry/watches/silverware				
Timex	2,104,000	1,628,000	774,000	326,000
Concord	688,000	163,000	41,000	149,000
Seiko	632,000	93,000	44,000	—
Liquors				
Seagrams	4,397,000	3,324,000	2,432,000	1,306,000
Calvert	2,862,000	3,741,000	719,000	461,000
Kessler	2,444,000	2,800,000	357,000	550,000

Top brand spenders in newspaper space (cont.)

	1980	1979	1978	1977
Lotteries				
New York	$ 2,245,000	$ 1,648,000	$ 1,079,000	$ 643,000
Michigan	1,148,000	1,107,000	1,134,000	1,075,000
Pennsylvania	668,000	587,000	678,000	818,000
Magazines				
Time	2,034,000	1,826,000	1,486,000	944,000
Sports Illust.	1,197,000	244,000	348,000	367,000
Newsweek	638,000	792,000	546,000	846,000
Mail Order				
Franklin Mint	8,270,000	6,280,000	7,064,000	9,165,000
Spencer Gifts	6,477,000	5,880,000	3,974,000	2,031,000
Mail Box U.S.A.	2,109,000	1,806,000	2,776,000	1,976,000
Meats/fish/poultry				
Hormel	2,208,000	1,945,000	1,584,000	1,552,000
Perdue chicken products	1,096,000	1,278,000	396,000	239,000
Swift's	783,000	942,000	803,000	557,000
Office equipment & supplies				
Xerox	3,103,000	1,476,000	1,507,000	869,000
IBM	2,874,000	1,718,000	717,000	1,558,000
Texas Instr.	1,065,000	150,000	87,000	46,000
Paints/wall coverings/other finishes				
Olympic paints	907,000	826,000	737,000	540,000
Glidden paints	389,000	297,000	296,000	115,000
Benj. Moore	279,000	167,000	159,000	190,000
Pet foods				
Purina	1,468,000	1,244,000	1,578,000	1,188,000
9 Lives	624,000	1,125,000	731,000	827,000
Gaines	479,000	163,000	55,000	133,000
Phonographs/records/tapes/recorders				
Columbia	6,185,000	4,452,000	6,614,000	5,831,000
Sony	3,112,000	1,199,000	966,000	1,294,000
RCA	865,000	1,365,000	2,379,000	2,294,000
Prepared dishes				
Swanson	1,234,000	159,000	376,000	411,000
Stouffer's	611,000	396,000	327,000	211,000
Tony's Pizza	244,000	33,000	98,000	88,000
Public utilities				
N.Y. Telephone	3,229,000	2,388,000	1,506,000	1,534,000
Southwestern Bell	2,693,000	1,405,000	1,325,000	1,128,000
AT&T	2,336,000	1,225,000	578,000	1,031,000
Radio/tv sets				
RCA	3,175,000	2,422,000	2,215,000	2,150,000
Sony	1,866,000	832,000	1,088,000	184,000
Zenith	1,633,000	2,284,000	2,169,000	2,409,000

Top brand spenders in newspaper space (cont.)

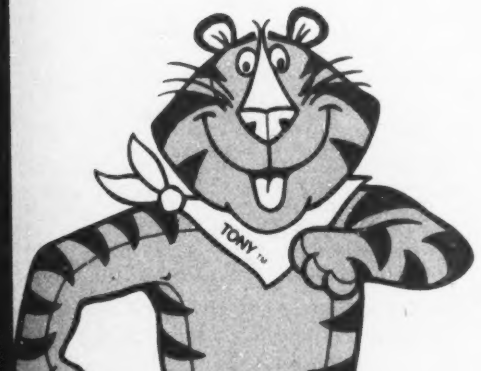
	1980	1979	1978	1977
Radio/tv stations				
NBC	$15,488,000	$12,839,000	$10,426,000	$ 7,100,000
ABC	11,808,000	10,891,000	10,148,000	5,706,000
CBS	7,870,000	8,388,000	7,541,000	5,761,000
Real estate				
Genl. Dev. (Flor.)	487,000	226,000	107,000	36,000
Dept. of Housing (HUD)	470,000	262,000	97,000	239,000
Sunrise Lakes	429,000	352,000	247,000	418,000
Railroads				
Amtrak	2,115,000	3,943,000	3,027,000	2,094,000
Burlington Northern	1,147,000	385,000	323,000	—
Ass. Amer. Railroads	133,000	116,000	95,000	127,000
Shortenings/oils/margarine				
Sunlit-Oil	760,000	548,000	48,000	—
Parkay margarine	523,000	673,000	492,000	107,000
Fleishmann's	397,000	397,000	31,000	48,000
Soaps/cleansers/polishes				
Texize	1,433,000	1,227,000	1,054,000	—
Brite	443,000	—	—	—
Dynamo	326,000	229,000	145,000	85,000
Sporting goods				
Ski Doo snowmobile	673,000	286,000	57,000	37,000
Royal Oak briquets	208,000	41,000	16,000	—
Maxfli golf balls	205,000	—	—	—
Steamship lines				
Holland American	4,555,000	3,037,000	3,294,000	2,198,000
Cunard	3,580,000	2,083,000	1,802,000	3,224,000
Princess Cruises	2,504,000	2,187,000	2,209,000	2,621,000
Tours/travel service				
American Express	2,168,000	2,028,000	2,210,000	2,478,000
Liberty Travel	2,155,000	1,618,000	1,391,000	1,374,000
Thomson Vacations	1,634,000	237,000	—	—
Trucks/mobile homes				
Ford	1,702,000	2,787,000	1,195,000	1,922,000
Chevrolet	1,215,000	851,000	622,000	540,000
Dodge	730,000	1,159,000	833,000	922,000
Vitamins/tonics/reducing aids				
Nutrition Headquarters	1,634,000	1,082,000	1,599,000	1,638,000
Weight Loss Center	1,334,000	—	—	—
Millburn Diet Formula	1,077,000	760,000	—	—
Wearing apparel				
Maidenform	1,342,000	1,435,000	1,697,000	2,224,000
Hush Puppies	964,000	789,000	684,000	841,000
Wolverine shoes	656,000	385,000	258,000	168,000

Estimates prepared by Media Records in 125 markets representing 82% of U.S. total

Brand report 66:

Cereals

Cartoon characters and ample advertising budgets have helped sustain dozens of long-favored brands, but the big media budgets are supporting a number of new entries. Reduced sugar cereal for children and high-nutrition bran cereals are the rapid climbers in the business.



Cartoon characters courtesy Kellogg Co.

Few businesses can lay claim to the boast that the breakfast food industry does: the cereal giants, led by king Kellogg, can accurately say that early morning risers daily eat the same cereal their grandparents did.

Dozens of brands have been sustained since the turn of the century — Kellogg is celebrating its 75th anniversary. The company not only put Battle Creek, Michigan on the map but also takes pride in knowing that its original product, Kellogg's Corn Flakes, is the most favored cereal on the market.

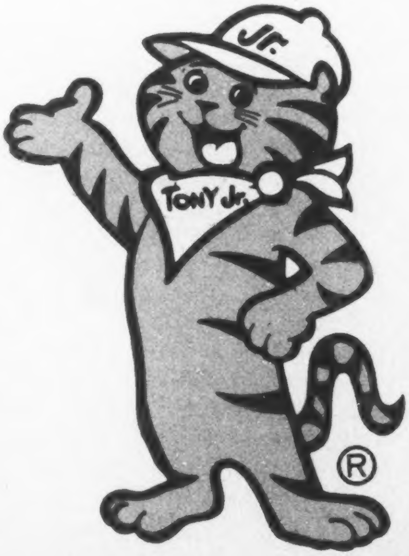
Tony the Tiger, Sugar Bear, Fred Flintstone and memorable ad slogans like "Snap, Crackle, Pop" have helped to sustain other cereals.

To be sure, some cereals have been removed from the grocery shelves, dusted off and refreshed with new positioning.

Cereal has seen its trendy times. One of those periods was in the middle seventies when the rage was granola-based cereals. The cereal was promoted as the one that would make your cheeks glow, but consumers soon sloughed it off. They found it natural and wholesome but not necessarily nutritious, and nutrition is one quality that consumers are increasingly mindful of.

So the cereal industry has been on a new product binge in recent years. Almost every cereal marketer has introduced a bran-based cereal, touting its nutritional content and high fiber ingredients.

Another sales trend cereal marketers



are keenly aware of is the increasingly popularity of basic lower-priced cereals, such as Cheerios and Chex. These cereals and other long-time favorites hold two-thirds of the market compared to about one-third for presweetened cereals.

Presweetened cereals have suffered a slight dip in sales. In the late seventies, sales slipped 5%. Furor over advertising these cereals to children and increasing concern about nutrition were linked to the reduction.

Controversy about Saturday morning cereal advertising, however, is evaporating. Several cereal companies have introduced or have in test market cereals with reduced sugar content for children. And the staff at the Federal Trade Commission, which for years had been pondering how to regulate such advertising if at all, has decided there is no way to regulate children's advertising in a practical manner.

In a 96-page report released in April, the FTC said that children under the age of six are virtually defenseless to cartooned cereal commercials, but noted that there is no logical way to regulate such ads and no way to determine if it encourages poor eating habits. The FTC also shied away from determining whether sugared foods pose a dental risk that should be disclosed in advertising. A final Commission decision has not been made but industry observers note that the FTC is moving away from regulation and will probably let this topic die.

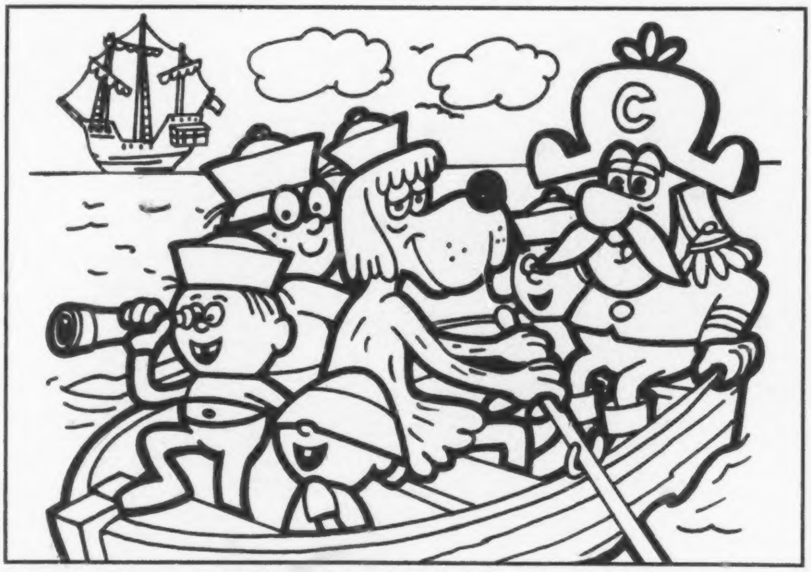
The impact of this news on children's cereal advertising probably will be minimal. Arnold G. Langbo, president of Kellogg's U.S. food division, noted that the company has never changed its advertising practice because of FTC proceedings. He said the company has always scrutinized ads as closely as possible for nutrition and high quality.

The cereal business also has come under fire partly because it has been too successful. The problem, in the FTC's view, is that this success has been spread too thin.

Kellogg commands a 42% share of market, followed by General Mills with 25% and General Foods with 15%. The three together control 82% of the market.

FTC contends that this strength has allowed the companies to market cereals at prices above competitive levels. The Commission is proposing that Kellogg's be broken up into five competing companies and the cereal divisions of General Foods and General Mills into two. A judgment is to be made on the proposal by this fall.

Media strategy has changed little: it is 94% television, both spot and network and any budget increases have been for inflation. Magazines used normally are women's service, where marketers offer coupons and recipes, and reach nutrition conscious mothers. Newspapers are the tools to introduce cereals.



Quaker Oats spends $5 million on Saturday morning television to make Cap'n Crunch easily recognized by children.

Kellogg

Kellogg continues its quest to dominate the breakfast table despite a number of obstacles in its path.

As the leader among several large food companies vying for cereal sales, Kellogg has been the central focus of protests about high sugar content in children's cereals and advertising of presweetened cereals to children watching Saturday morning cartoons.

But the company has fired back at its protestors and has continued to heavily promote its many presweetened cereals with cartoon characters like Tony the Tiger, who have helped Kellogg to reap 33% of its cereal sales from products marketed to children. The company recently introduced several other children's cereals to further increase its lead in that category, one it already dominated with the help of Sugar Frosted Flakes, Rice Krispies and Froot Loops.

The furor over nutritional benefits prompted Kellogg's Tony the Tiger, who once boasted of the "GREAAAT" taste of Kellogg's cereals, to encourage children to eat a balanced breakfast, cereal included. And it led the company to sponsor primetime ads featuring talk-show host Dick Cavett on the nutritious contents of adult cereals.

The company also initiated an advertising campaign, aimed at opinion leaders, on nutritional value of presweetened cereals.

Recently, Kellogg took a more positive approach to the issue by dropping the Cavett and thought leader campaigns. It replaced those with an overall ad theme, "It's gonna be a great day," highlighting quality and health values.

This year, the company that made Battle Creek, Michigan famous is celebrating its 75th anniversary with pride. Its original product, Kellogg's Corn Flakes, remains the market leader, its 7.5% market share towering over all cereal products. General Foods' Post Toasties offers Kellogg's brand of corn flakes its only competition.

Overall, Kellogg markets four of the top five brands, including Corn Flakes, Raisin Bran, Rice Krispies and Sugar Frosted Flakes.

Kellogg, however, is not resting on its laurels; several new products aiming for new segmentation opportunities have been introduced. Established brands are still heavily supported by advertising but newer ones are receiving greater media weight. Three new Kellogg's brands rank within the ten most heavily advertised brands.

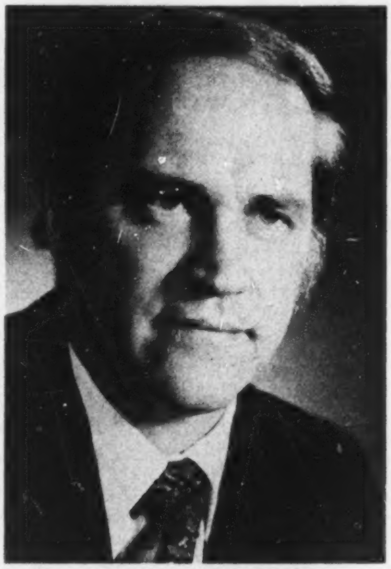
Despite support for newer cereals, Kellogg is finding consumers opting for basic and often lower-cost cereals, such as corn flakes and Rice Krispies, according to U.S. food division president Arnold Langbo.

At the same time, however, Langbo indicated that a new corn flake product that includes honey and nuts, and a ready-to-eat cereal that, for the first time, incorporates rye into a flake are doing very well.

Honey & Nut Corn Flakes, a sugared version of the company's original product, is market to families, and primarily to teen-agers. The "See it, hear it, taste it," ad theme plays up to its nutty ingredients, crunchiness and taste. Its introductory send-off last year was supported by an ad budget of $6.8 million.

A second new product introduced last year was a technological breakthrough for Kellogg. Raisins Rice 'n Rye is the first product to include both rice and rye in one flake, and the first to put rye in a ready-to-eat cereal. Marketed as a family product, its introductory budget was $4.1 million.

Growing health concerns have been central to Kellogg's new directions. Two years ago, the company began marketing one of the most nutritious cereals on the market, aptly named Most. Most is marketed as a unique product that is not only 100% fortified with vitamins but also high in fiber. It is Kellogg's most successful new introduction and the company is supporting it with a $6.2 million budget in the second year of national distribution.



Kellogg president Arnold G. Langbo says dropping of children's ad rule won't change advertising practices.

A second product aimed at health conscious adults, however, was pulled from test markets early this year, apparently because its introduction was premature, according to Langbo. This was Smart Start, a flaked wheat and corn product high in iron that was being marketed to working women.

Kellogg's high-protein cereal, Special K, and Product 19, a 100% fortified brand, are being pumped with new advertising funds to tie in with growing consumer concern about proper foods. Special K's media budget was cut to $3.2 million from $4.8 million in 1979 but new creative is intended to increase sales of the product among teen-agers. Product advertisements now picture teen-agers in active situations, although the central theme of the campaign remains weight maintenance, typified by the famed "if you can pinch more than an inch" copy line.

Product 19, has received steadily increasing media support. Last year, its media budget was $3.4 million, positioned as the cereal for "busy bodies". Print ads for both products are customary in younger-oriented women's books.

Both are more heavily advertised than most of Kellogg's other established brands, except for Frosted Mini-Wheats with $4.5 million and Rice Krispies at $4.9 million. Most of Kellogg's presweetened cereals are supported with budgets that range from $2.1 million to $3 million.

A new campaign this year groups Kellogg's four bran cereals under one ad theme to tie in with a growing consumer interest in getting more bran into the diet. Print ads for All Bran, 40% Bran Flakes, Bran Buds and Cracklin' Bran offer recipes for baked goods that include bran.

General Mills

Leprechauns, birds, rabbits and monsters have helped put General Mills in second place in the cereal business. With a host of long-time favorite children's cereals such as Trix, Lucky Charms, Cocoa Puffs and Count Chocula, in addition to a line of family cereals, General Mills commands 19% of the market.

A children's cereal General Mills introduced last year uses a tactic decidedly different than the typical Saturday morning cartoon fantasies.

Budgets for leading cereal advertisers by company

Company	1980	1979	% change
General Foods	$33,389,500	$28,636,500	+16%
General Mills	58,340,600	60,465,000	−3%
Kellogg	80,112,900	71,683,700	+11%
Nabisco	3,006,000	5,509,600	−45%
Quaker	29,153,500	25,305,300	+15%
Ralston Purina	16,354,800	14,852,300	+10%
All others	1,911,200	3,519,000	−45%
Total	222,583,000	209,289,900	+6%

Source: Leading National Advertisers, Radio Expenditure Reports and Media Records

Courtesy of General Mills

Called Body Buddies, the cereal is presweetened for children but is marketed to mothers with a heavy print budget as the children's cereal highest in vitamins and minerals. The $6.2 million introductory budget also takes in spot and network television.

General Mills has extended its most popular cereal, Cheerios, with a honey and nut flavor. Honey Nut Cheerios was launched in 1979 with a budget of $7.4 million, coming close to the $9 million budget for Cheerios. Cheerios is given an all family treatment, emphasizing nutrition and high protein in a heavy network and spot television campaign with minimal print advertising.

Wheaties, long promoted as the breakfast of champions, still carries that athletic theme, now with Bruce Jenner as spokesman. Wheaties is General Mills' third most popular cereal, but the company spends more to advertise Total, its 100% fortified cereal. Total's 1980 budget was $6 million, which included heavy use of print, while Wheaties was advertised with a budget of $2.3 million, down from $4.4 million the previous year.

General Mills tends to use more print than its competitors. Kix, a corn-puffed cereal is advertised in print to mothers as the "mother-approved and kid-tested" cereal. A special promotion for Golden Grahams ties that product in with Nestle milk chocolate and Karo corn syrup for a print-advertised recipe for S'mores, made of graham crackers, toasted marshmallows and chocolate.

The company's granola product, like other granola products on the market, has declined in popularity. Nature Valley Granola, the company said has found a smaller niche among older consumers in smaller towns. The product is advertised exclusively on spot television to reach those markets. Last year, ad support for the granola product fell to a minimal amount, following heavy support in the earlier seventies.

General Foods

General Foods has not introduced any cereal brands in the last three years, following disappointment with its granola-based cereal, C. W. Post.

Although C. W. Post was not a winner despite a large introductory ad send-off, industry observers attribute General Foods' new product sluggishness not to that poor performance but to a general indication that the cereal market has entered a slow-growth period. Granola-based cereals have not struck it big in general. General Foods instead is spending heavily to promote some long-proven brands, Post Raisin Bran and Post Grape Nuts.

® Courtesy of Kellogg Co.

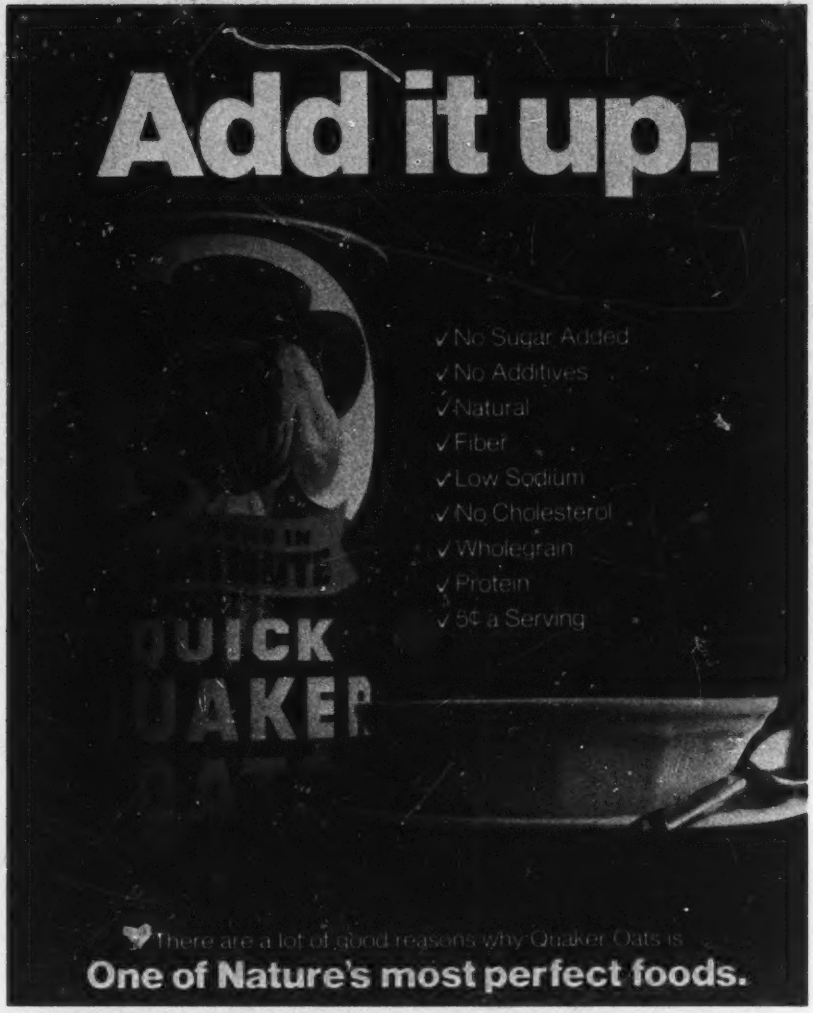
Last year, Raisin Bran's budget was outranked only by three others. Spending for the product in 1980, positioned as the fruit lover's cereal, was $7.2 million in network and spot television, following a mysteriously low spending level the previous year.

The light fiber product competes with Kellogg's Raisin Bran, and together the two brands account for 9%

Leading cereal media spenders in 1980

	total	magazines	news supps	net tv	spot tv	newspapers	spot radio
Crispy Wheat 'N Raisins	$8,622,500	241,500	53,000	6,192,900	2,175,100	209,800	
Cheerios	8,121,700	32,800		3,990,700	4,098,200	17,400	
Quaker Corn Bran	7,607,100	372,300		7,164,900	69,900		12,600
Post Raisin Bran	7,243,700			6,764,000	479,700	8,000	
Kellogg's Honey & Nut	6,813,700			5,719,400	1,094,300	290,000	1,000,000
Kellogg's Most	6,232,500			6,076,800	155,700	193,000	
Body Buddies	6,210,500	367,800		3,376,800	2,465,900		
Total	6,197,800	328,800		5,541,800	327,200	156,700	
Life	5,903,500	212,000		4,296,800	1,606,700	44,700	
Kellogg's Graham Crackos	5,222,900			3,787,700	1,435,200	253,200	
Cheerios Honey Nut	4,875,200			3,033,900	1,841,300		

Source: Leading National Advertisers, Media Records and Radio Expenditure Reports.



Quaker Oats was repositioned with a $3 million ad budget that touted oatmeal as one of nature's most perfect foods.

of the total cereal market, although the Kellogg brand is more popular among consumers despite higher spending levels for the Post version of raisin bran.

Last year, the Grape Nuts account was moved from Benton & Bowles to Grey Advertising in an attempt to move the product off the shelves more quickly. New creative was built around a wilderness man theme, positioning the product as the cereal "that has respect for nature."

The Grape Nuts line is comprised of three products, one with raisins, now going into test market. The other products are the basic and flaked versions.

Spending for the three Grape Nuts products falls in the $7 million range, with network and spot television as the base media.

General Foods offers Kellogg's its only competition to Corn Flakes, a most important category in the market. Although Post Toasties is a national brand, ad support is in the southwest only. The campaign plays up its "farmer fresh corn taste."

For its presweetened cereals, General Foods spends, on the average, $5 million to maintain sales. Sugar Bear helps to sell Super Sugar Crisp, Fred Flintstone pushes Pebbles, and the 26 letters of the alphabet help to move packages of Alph-Bits.

Ralston Purina

The resurgence of Ralston Purina's leading cereal, Chex, has helped the St. Louis company fund an aggressive new product expansion, pushing its market share to 6%, trailing closely Quaker Oats.

Ralston went national last year with Waffelos, a children's presweetened cereal tasting like maple syrup and supported on Saturday morning television with $1.3 million. That effort follows the successful introduction of another children's cereal, Cookie Crisp, coming in favorite cookie flavors, chocolate chip and vanilla. Its Saturday morning television budget: $2.3 million, down slightly from introductory years.

Ralston is also seeking opportunities in the popular bran category. Last year, Honey Bran, a cereal for the family, was put into the market with $3 million of advertising support in network and spot television, promoting its honey taste and high fiber. Three years ago, the company added a bran-based cereal to its Chex line.

The Chex line, long-established and well-known, has recently seen new life. Ralston attributes that renewed vitality to consumer preference for basic cereals in an inflationary economy.

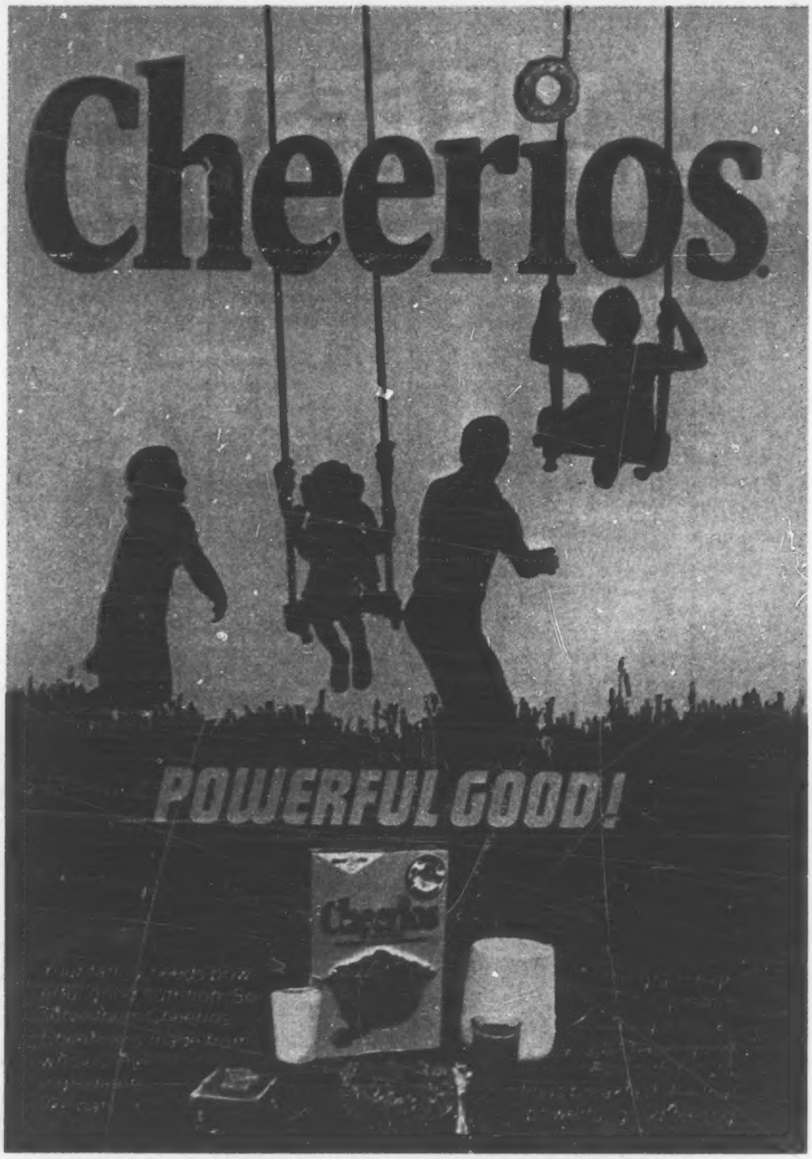
All Chex cereals, in wheat, corn and rice and the newly added bran, are advertised under the umbrella theme, "If you don't like Chex cereals, you haven't tried Chex cereals." The overall ad campaign ties all Chex products together, carrying a budget of $9 million, although individual cereals also are promoted separately.

Ralston is making sure that its products can live up to that advertising boast. It has been expanding the Chex line with new products. Two years ago, Wheat & Raisin Chex was added. This product is vying for sales against Raisin Bran products.

Nabisco

A lot of people grew up with Nabisco's oldest and most popular cereal, Shredded Wheat, which dates back to the turn of the century. It ranks as one of the most popular cereals nationally, and Nabisco directs the bulk of its ad dollars toward it.

Last year, the product received $2 million in ad support out of the company's total ad budget of $3.3 million. The ad campaign which runs in television dayparts, emphasized the cereal's whole wheat and natural qualities. Nabisco advertises it jointly with its spoon size shredded wheat, Shreddies, based on a recommendation from its



General Mills' most popular cereal, Cheerios, is positioned as a nutritious family cereal with $9 million in print and tv.

new advertising agency, McCann-Erickson.

"The products are essentially the same except for form, so we can advertise both without sacrificing either. It gives us a synergistic effect," said William McKnight, vp-marketing.

Nabisco spends on a limited basis in support of its two hot cereals and two other ready-to-eat cereals. Last year, it spent barely over $1 million for those products. That budget was cut from the previous year's $5.5 million. The drop could be attributed to the advertising agency shift, as the new ad agency evaluated new opportunities, but Nabisco refused comment.

Nabisco's 100% bran, introduced as another entry to the booming bran cereal segment, takes on competing brands by stressing that it has 50% more fiber than other entries. The campaign is primarily print in women's service magazines.

Team Flakes, Nabisco's all family cereal made of four grains, is advertised with a budget of only $250,000 a drop from the 1979 level of $1.2 million. It is promoted in women's service magazines as well as Sunday supplements, stressing its four-grain contents.

Nabisco leads the hot wheat subcategory with Cream of Wheat. The network television budget of $500,000 advertises it as "the cereal you remember."

Currently in test market is another hot cereal, this one fortified and made of oats and wheat. Its test name is Morning Power, advertised in magazines and spot television.

Quaker Oats

Quaker Oats is best known for its hot oatmeal of the same name. That cereal is 130 years old, and still is a lively entry in the cereal market.

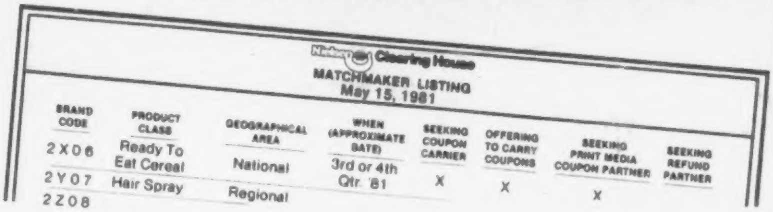
The company recently pulled the cereal off the shelf and dusted it off, revitalizing it as one of "nature's most perfect foods" after ten years without television advertising. In 1979, Quaker began a $3 million tv and print campaign playing up the natural benefits of the product: no sugar, no cholesterol, no additives, high protein, high fiber and a cost of only five cents a serving.

> **"Life is best remembered by Mikey, a picky eater who loves the cereal even though it's good for him."**

Quaker is also seeking market segments for two new products for health conscious consumers. Last year, it introduced Quaker Corn Bran, the first bran cereal made from corn. It is spending $8 million — the level of spending for two popular cereals, Post Raisin Bran and Cheerios. Media includes primetime television, Sunday supplements and women's service magazines. Quaker is also paying attention to the controversy over presweetened children's cereals. Last year, it test-marketed Halfsies, a presweetened cereal with half the sugar content. It was pulled out of test market this spring but the company says the product is a viable concept and it currently is evaluating test results.

Quaker's fortified all family cereal, Life, is best remembered for the "Mikey" television commercials, featuring young Mikey, a pickey eater who loves Life, even though the cereal is good for him. First advertised as a high-protein, nutrional cereal,

NIELSEN CAN HELP FIND PARTNERS FOR YOUR CONSUMER PROMOTIONS WITH MATCHMAKER™



Nielsen Clearing House
MATCHMAKER LISTING
May 15, 1981

BRAND CODE	PRODUCT CLASS	GEOGRAPHICAL AREA	WHEN (APPROXIMATE DATE)	SEEKING COUPON CARRIER	OFFERING TO CARRY COUPONS	SEEKING PRINT MEDIA COUPON PARTNER	SEEKING REFUND PARTNER
2X06	Ready To Eat Cereal	National	3rd or 4th Qtr. '81	X	X	X	
2Y07	Hair Spray	Regional					
2Z08							

A quick review of your consumer promotion efforts for the past few years will point out an almost certain fact: the amount of promotion you get for each dollar you spend is declining rapidly.

One answer to escalating costs has been cooperative arrangements between organizations having compatible promotional objectives. The result is an increase in the breadth and scope of promotions, while cost-sharing keeps expense to a minimum.

The Matchmaker Concept Matchmaker is a bimonthly publication of the Nielsen Clearing House that contains offers by prominent national companies who seek partners in cross-couponing, print media tie-in or other promotion programs. It also gives subscribers a chance to enter listings to find partners for their programs.

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Boys and Boys' Life make toy and hobby cash registers ring.

Boys are avid hobbyists. They're intently interested in all kinds of models, from those they build to those they race, as well as crafts and science projects.

Boys are also great fans of electronic and other games. They take their playing very seriously—and this extends to the products and brands they own.

When it's time to choose these products, boys look to Boys' Life. They trust Boys' Life and know the products they see there are reliable and good.

Parents like Boys' Life too. They know Boys' Life consistently delivers high quality editorial and that their sons enjoy reading each issue.

That's why many toy and hobby advertisers have chosen Boys' Life as part of their media mix ... advertisers like TSR Hobbies, Fundimensions, Fischer America, Bachmann Bros. and many others.

For more information on Boys' Life's 6.4 million readers, and how you can sell your products to them, call your local Boys' Life representative.

When the male youth market is your target audience, you can't miss with

BOYS' LIFE
THE MAGAZINE FOR ALL BOYS
Published by the Boy Scouts of America
(212) 532-0985 (213) 802-2571
(312) 782-6950 (404) 939-8391

Life was repositioned in the early seventies as a tasty product. It is advertised on primetime, afternoon and morning television as well as major women's magazines, with a budget of $5.4 million.

Quaker's 100% Natural cereal, the first granola product introduced, reached its sales peak in 1975 after three years on the market as did other granolas. The company in 1978 repositioned 100% natural as a product for active athletes using Jim Fixx, author of the "Complete Book of Running" as spokesman for the product. It is being advertised on spot television in seven markets where the product is popular.

Courtesy of General Mills

Quaker's entry in the presweetened market, Cap'n Crunch, is advertised to children primarily between Saturday morning cartoons. The company believes its success is attributable to the highly identifiable cartoon character, Cap'n Crunch. Quaker spends approximately $5 million on television time to advertise the product.

Quaker's Puffed Wheat and Puffed Rice rival its oatmeal for longevity. The company claims these products were the first ready-to-eat cereals — 80 years old. The brands today carry little advertising, with a market among older adults on restricted diets. It has no sudium, no sugar, and is easy to eat.

Rebecca Fannin

7/13/81 C 2950-3

MARKETING & MEDIA Decisions

JULY 1981 • $3.00

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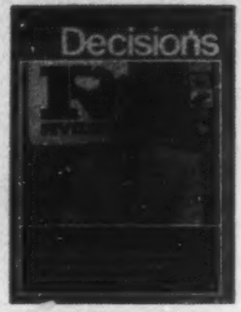
WASHINGTON DC 20014

DIRECTORY OF TOP 200 BRANDS

Can advertising regulate itself?

Satellite-to-home broadcast



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MEDIA COST INDEX

Black bars index for 1980; red bars 1981; base year 1977

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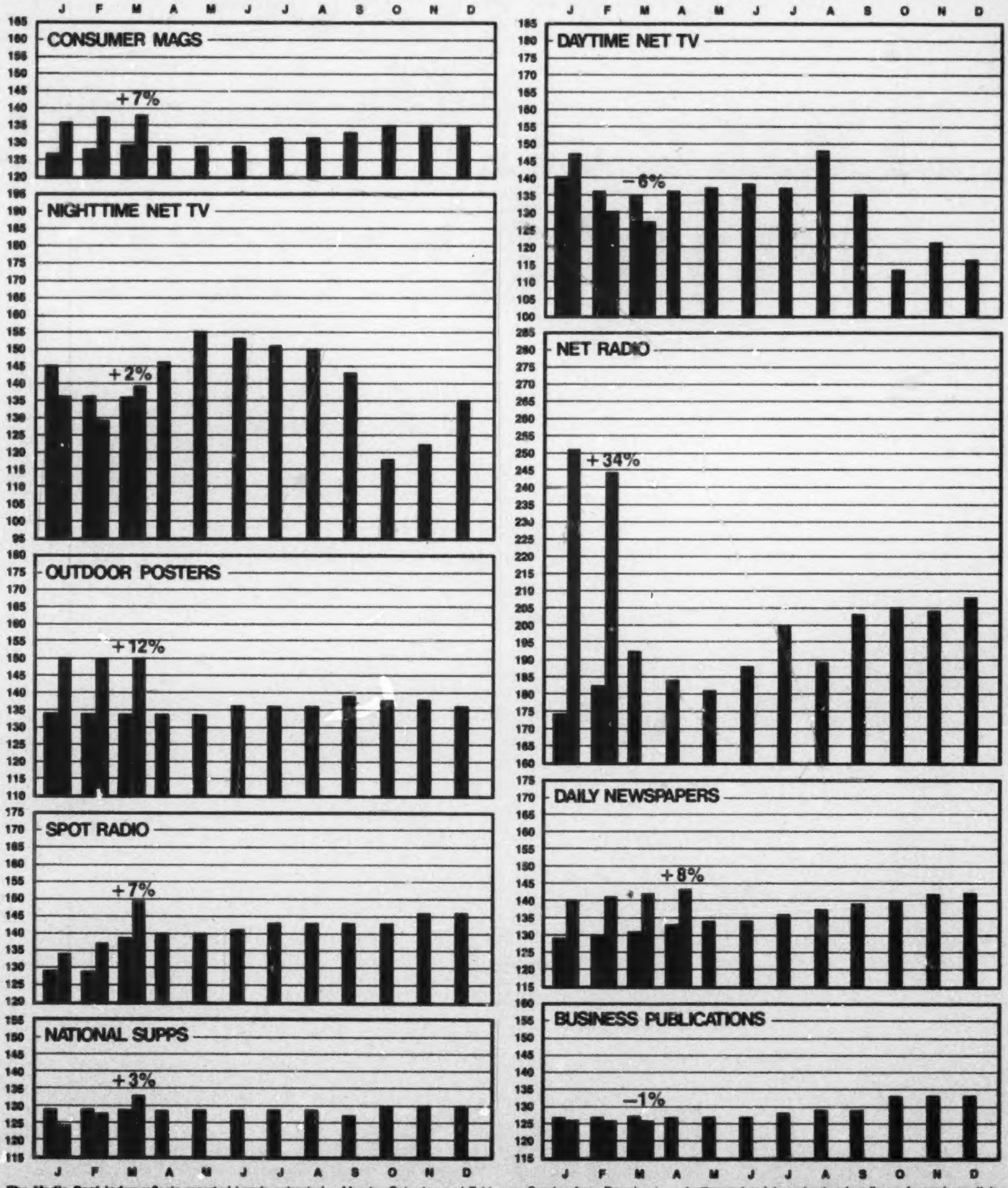

The Media Cost Index reflects reported trends extracted from available published sources. This analysis uses standard competitive report sources to develop comparable costs that reflect monthly cost trends by medium. Where industry competitive sources are unavailable, selected cost data from SRDS are sampled. Sources: **Nighttime Network TV** — cost per average 30-second spot 7:30-11 p.m. Monday-Saturday and 7-11 p.m. Sunday from Broadcast Advertisers Report Network TV Service. **Daytime Network TV** — cost per average 30-second spot 10 a.m.-4:30 p.m. Monday Friday from Broadcast Advertisers Report Network TV Service. **Network Radio** — cost per average 30-second radio announcement from Broadcast Advertisers Report Network Radio Service. Index 100 for Nighttime network tv, daytime network tv and network radio are for each month in 1977. **Spot radio estimates** are based on SRDS cost of one minute on one station per market in the top 50 RADI markets. **Consumer magazine estimate** based on reported SRDS cost of page, 4-color in 30 national consumer magazines based on circulation. **National Supplements estimates** based on reported SRDS cost of page, 4-color for

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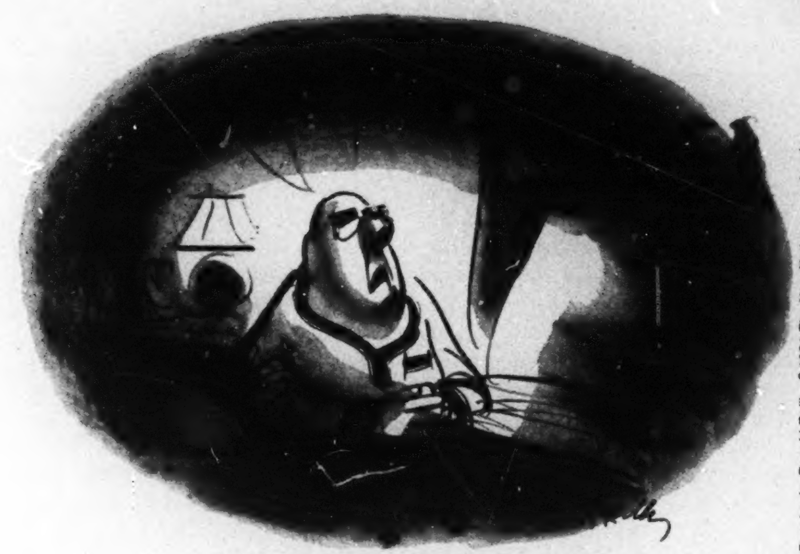


". . . *and please grant me and the rest of the board the grace not to abuse deregulation.*"

Drawing by Donald Reilly; © 1981 The New Yorker magazine, Inc.

Can advertising regulate itself?

The Reagan Administration has made its position clear: business works best when left to handle its own problems. More than ever, the burden of policing advertising will fall to existing self-regulatory bodies. Is advertising up to the challenge? *Decisions* went to self-regulators to find out.

Some advertising people still haven't overcome the feeling of euphoria.

The Federal Trade Commission, once the fire-breathing regulatory monster that threatened to wreak havoc on advertising, now limps along meekly, laid low by a crippling fight with Congress last year, and this year by Reagan Administration budget cuts.

At the Federal Communications Commission, chairman Mark Fowler charts a course for broadcast deregulation. A private sector lawyer by experience, Fowler intends to keep FCC out of the way of the developing electronic technologies, and to eliminate regulations that needlessly hamper traditional broadcasting.

Communications deregulation is already underway in Congress as well. The Senate Communications Subcommittee, chaired by Arizona Republican Barry Goldwater, and the House Telecommunications Subcommittee, chaired by Democrat Timothy Wirth of Colorado, are considering deregulatory moves that will affect cable system ownership, operation of the Corporation for Public Broadcasting, tv and radio licensing procedures, and AT&T's involvement in database communications.

So it's no wonder that advertising people are a little giddy. Says Howard Bell, president of the American Advertising Federation: "Overall, I'd have to say we're heading into a very good period for industry, business and advertising."

But Bell also adds a note of caution to his prediction. "We've gone from an era ten years ago of consumer protection, to the current era of deregulation. And that pendulum will undoubtedly swing back in the other direction in the years ahead. While it has swung in our direction for the moment, we've got to further prove that what we've been saying all along is true — that self-regulation can be more effective and efficient than government regulation."

"We've gone from an era ten years ago of consumer protection, to the current era of deregulation. And that pendulum will undoubtedly swing back in the other direction in the years ahead. While it has swung in our direction for the moment, we've got to further prove that what we've been saying all along is true — that self-regulation can be more effective and efficient than government regulation."

— Howard Bell,
President,
American Advertising Federation

Does self-regulation work? The advertising business has had a self-regulatory mechanism in place for a decade. The National Advertising Division of the Better Business Bureau, and the National Advertising Review Board celebrate tenth anniversaries this month. Both handle complaints about truth and accuracy in advertising, and get generally good marks on their performance from industry observers.

In addition to NAD/NARB, advertising is regulated under the National Association of Broadcasters' Code, by network and independent tv station standards departments, by legal departments at agencies and client companies, by newspapers, and by a few magazines, such as *Good Housekeeping* and *The New Yorker*. The latter two review advertising claims appearing in their publications.

Industry observers praise the self-regulatory system, calling it faster and more efficient than government controls. Don Johnston, chairman of J. Walter Thompson, notes that "by definition, we're a lot more knowledgeable than a government bureaucrat who doesn't know anything about business, let alone advertising." NAD complaints seldom are in the works longer than six months; some government investigations drag on for years.

NAD/NARB has also been credited in relieving the burden of a large case load from FTC. Some of that credit has even come from government regulators. In a speech before the NARB in 1978, then-FTC chairman Michael Pertschuk said, "Day in and day out at the FTC we plug away in pursuit of the ideal marketplace: entrepreneurial, innovative, unfettered and above all competitive. But we also have competitors, and in one marketplace we're taking a beating: the competition to clean up shoddy and deceptive advertising. The NARB has shamelessly cornered the market. You've skinned the cream of deceptive ads, outrageous frauds and misrepresentations . . . it is entirely appropriate as a private body that you police cases in which the law and public policy are clear. And leave us, however painful, the close ones."

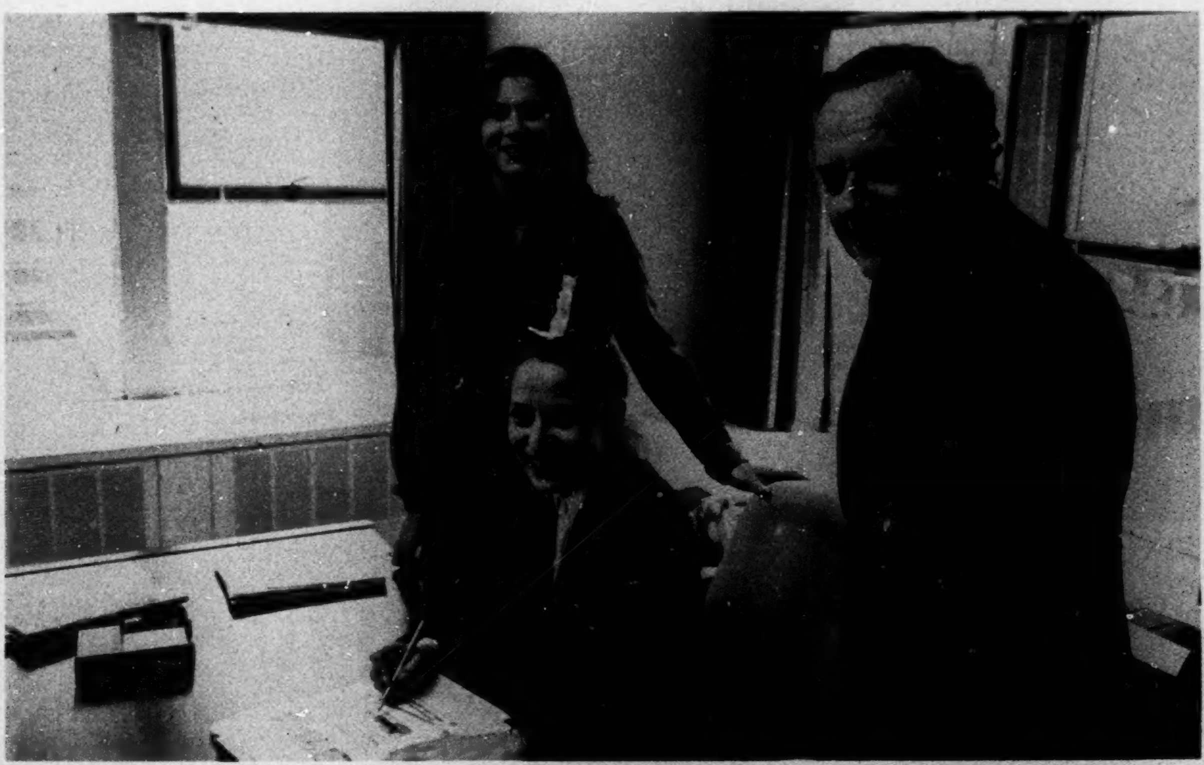
However, most observers agree that self-regulation of advertising is at a crossroads, and that there is still work to be done. For example, truth and accuracy of local advertising should be improved, according to some sources, especially as cable tv continues to develop as an advertising medium. AAF and the Council of Better Business Bureaus this spring announced a new program of local ad self-regulation, under which Advertising Review Comittees will consult and advise local CBBB staff on individual cases. The committees will include members affiliated with local advertisers and agencies, and representatives from the public at large. The AAF/CBBB plan recommends that the chairmen of the committees be selected from its public members.

AAF has 203 advertising clubs around the country.

NAD/NARB is a two-tiered operation. All complaints about truth and accuracy first go to the lower level, the NAD. After reviewing and evaluating a complaint, NAD either dismisses the case or requests substantiation from the advertiser of his claims. Although NAD does not write specific rules, it does from time to time comment on issues such as presentation of products in unsafe settings, or correct usage of the term "free" as it applies to extras offered by airlines in advertising. Says NAD senior vice president Lorraine Reid: "We take each case on an individual basis, and ask ourselves, does this have the potential to hurt the consumer in any way?"

From its inception in mid-1971 through the end of 1980, NAD processed 1,635 complaints about national advertising. NAD also has a Children's Advertising Review Unit that has handled 152 cases since its start-up in 1974.

If NAD finds the substantiation of claims in advertising inadequate, it asks that the ad be discontinued. In most cases, advertisers comply with this request — often, the specific ad in question has already been pulled from the market. However, if an agreement is not reached, the matter is appealed to the NARB. There, a panel of three



Since its inception in mid-1971, NAD and NARB have processed nearly 2,000 complaints about national advertising. From right are NAD director Ronald Smithies; senior vice president Lorraine Reid; and children's advertising unit director Kathleen McGowan (standing).

advertisers, one representative from the public, and one agency-side representative review evidence and judge the merits of the complaints.

Although NAD/NARB was created as a response to pressures from the consumer movement, public complaints about advertising are far from the top of the list of sources for self-regulatory cases. By NAD's own count, the most frequent source (36%) is NAD's own program of advertising monitoring, and the second most frequent source (20%) is competitive challenges. Individual consumers account for 13% of complaints, and consumer groups originate 10% of complaints.

Does the low number of complaints from consumers mean that self-regulation is working? Not necessarily. One reason noted by NAD and its critics is that the self-regulatory mechanism isn't very well known. Says Ronald Smithies, NAD's new director, who joined last November from the Good Housekeeping Institute: "We still have a great deal to do to make sure decisions of the NAD are known everywhere."

Peggy Charren, president of Action for Children's Television and one of the consumer movement's most vocal critics of the media, states the case more bluntly: "You always see the NAD people getting up at meetings and claiming that there are no serious problems because there are so few complaints from the public. The public doesn't even know there's a FTC and what *it* does, much less the NAD. I have trouble getting their name straight sometimes myself."

A public opinion poll conducted for a study of NAD/NARB at the University of Illinois found that less than five percent of the public was aware of the self-regulatory mechanism.

Another poll, conducted in 1978 by the Gallup organization for an NARB white paper that was released recently, examined public perception of advertising. The committee that commissioned the poll, headed by Gus Priemer of S. C. Johnson Co., sought to examine "the scope and nature of consumer complaints about advertising," according to the committee's summary of the report.

The most frequent complaint, expressed by 10% of the national sample, was that "advertising is not truthful or accurate." And 50% of respondents told Gallup that "there was at least one time in the past year when they wanted to complain about an ad."

However, the panel interpreted these figures positively. "NARB has performed well in dealing with questions of falsehood or deception in national advertising, the area in which it is primarily charged to operate," the panel wrote, noting that the poll showed that "most consumer complaints were in the area of taste (the advertising of feminine hygiene products, or advertising that 'insults the consumer's intelligence')."

Finally, the panel noted that 16% of Gallup respondents had actually com-

Continued on page 101

plained to anyone, a figure roughly paralleling the percentage of complaints NAD receives from the public. How does NAD/NARB square consumer dissatisfaction with the low number of complaints?

"You have to separate the reaction to a tv set, and the action that the viewer takes," says Priemer. "If someone says something on the tube that I don't like, or sounds false, I don't get on the phone or write a letter. I just tune you out if you're not playing straight with me. The reaction comes if the consumer is hit in the pocketbook at the store, if the product is actually no good or doesn't measure up to the claims made in the advertising."

One of the most controversial advertising regulatory topics, and one that serves as a useful case history in any examination of the effectiveness of self-regulation, is children's advertising. FTC is dropping its three-year-old investigation of children's ads, stating that not enough evidence was found to justify a rulemaking procedure. But consumerists such as Peggy Charren of ACT plan to continue challenging advertisers in this area on a case-by-case basis.

Most industry observers claim children's advertising is already the most strictly controlled area of advertising. Kathleen McGowan, who directs NAD's Children's Advertising Review Unit, explains that the children's advertising guidelines "touch on many areas — like social values — a desire that ads should reflect generally accepted legal, social moral values — that ads shouldn't reflect disdain for parents — that ads should not place undue pressure to purchase on kids. We go into presentation of products that need to be shown very clearly and objectively so kids don't misconstrue the actual working of products from the ad.

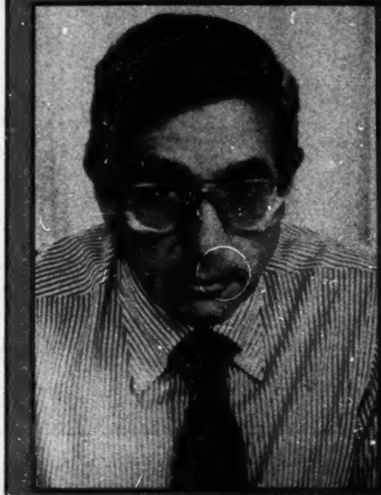
"Food products should be shown in context of a healthy, balanced diet. Ads shouldn't show any one product being over-consumed."

The review unit retains seven academic advisors with backgrounds in child psychology, behavioral sciences and nutrition, who help evaluate

Will [illegible]
"Co[illegible]

Cable television, [illegible] relatively free of [illegible] lation to date, is likely [illegible] point of self-regulation [illegible] 1980's, according to the NAD and network standards and practices executives.

NAD senior vice president [illegible] raine Reid has met with officials of the National Cable Television Association to discuss ways in which advertising on cable might be self-regulated. But Reid says NAD has advised NCTA to "stay away from rigid rules. Clearly they need to set down some general principles of what is and isn't acceptable in cable advertising, but it would be a mistake for them to freeze experimentation. My hope is that the new media will bust the old advertising forms; it's a marvelous opportunity for experimentation and trying all sorts of new things."



Cable "isn't struggling with what's acceptable and what's not," according to ABC's Alfred Schneider.

The television [illegible] pressed for [illegible] as well as self-regulation of cable on the basis that cable [illegible] competitive edge [illegible] series unfettered by [illegible]

In a speech before the [illegible] Carolina Association of Broadcasters last October, ABC [illegible] [illegible] services, [illegible] cable penetration [illegible] Almost [illegible] television homes are [illegible] and that's a 15% [illegible] year. By another [illegible] the NCTA estimates that advertising revenue quadrupled from 1975 to 1979. Cable is fast becoming a mass medium. And this growth increases the urgency of standards for cable's entertainment and commercial offerings.

". . . But cable isn't struggling with what's acceptable for viewing in the home and what is not. R-rated films are commonly shown in unedited form, and sometimes only weeks before the same film in an edited version is carried on a broadcast network . . . . Many of you are familiar with public access channels, and what's appearing in the home. One regular show in New York City features a host who roams the city with portable video equipment in search of young women willing to undress for his camera. In another public access program, which aired on Christmas Eve in New York, a small dog was shown being tied to a stake; a gun appeared, two shots rang out, and the dog fell to the ground, dead. The 30-second loop was repeated for half-an-hour.

"Putting aside the legal history and different origins of cable and broadcasting, it seems perfectly straightforward to say both should meet certain public standards . . . . we see the need for a strong self-regulatory mechanism to be established for the cable industry. The [illegible] should deal with standards, [illegible] requirements, [illegible]. The guidelines should cover both programming and commercials. [illegible] to join the [illegible] to become part of the ongoing national debate about what is socially acceptable."

NAD case status report

	Month of Dec. 31/80		Current Year 1/1/80-12/31/80				Cumulative 7/71-12/31/80			
	Adult	Children	Adult	Children	Tot.	%	Adult	Children	Tot.	%
Source of Complaints:										
Consumers	2	—	7	1	8	6	218	15	233	13
Consumer Groups	—	—	—	—	—	—	174	5	179	10
Competitors	5	—	52	1	53	37	355	3	358	20
Local BBB's	3	—	17	—	17	12	309	5	314	18
NAD Monitoring	4	2	49	14	63	45	527	122	649	36
Other	—	—	—	—	—	—	52	2	54	3
Total	14	2	125	16	141	100	1,635	152	1,787	100
	16		141							1,787
Cases Closed:										
Referred to NARB	—	—	—	—	—	—	14	—	14	1
Dismissed-Adequate Substantiation	7	—	52	5	57	41	649	34	683	39
Modified or Discontinued	5	1	66	12	78	57	620	103	723	42
Administratively Closed	—	—	2	1	3	2	303	12	315	18
Total	12	1	120	18	138	100	1,586	149	1,735	100
	13		138							1,735

Source: National Advertising Division, Better Business Bureau

advertising claims, and advise on general issues concerning children's advertising.

McGowan and others stress that the children's advertising self-regulatory unit will continue to carefully check children's ads, even though the FTC has dropped its investigation of the subject.

"FTC was looking into broader questions of health — the social questions," McGowan says. "They seem to have dropped this because they don't have the research to support the conclusion that advertising to younger kids is harmful, or that advertising of food products like candy or presweetened cereals is necessarily detrimental to children's health, or that it has a significant impact on a child's view of nutrition."

Peggy Charren, predictably, has a somewhat different view. "Self-regulation of children's advertising is a joke." Charren believes that the guidelines are too loose, and their scope too narrow.

"The whole idea of selling junk cereals to children is a failure of the self-regulatory mechanisms of the cereal industry," she says. "The code says cereal has to be positioned as a part of a balanced regiment. So what happens? Smart ad agencies take a provision like that, and instead say, 'If you want to eat a balanced breakfast, you've got to eat Cookie Crisp!' That says to me there's no way to have a balanced breakfast without this cereal.

"Then they set up something like the Children's Advertising Unit in the NAD, and they hire and pay experts in child development from universities, and they give them a mandate that says all they can consider is if the ad is blatantly deceptive. They can't consider the real problem, which is whether the food is good for kids or not, whether it should be pushed to kids on television."

According to Howard Bell, Charren's criticisms are "generalized and unscientific, based on the fact that she doesn't like advertising to children, *period*. She does not want advertisers to suggest to children that they should eat cereals or candy. She's generalizing that because they are being asked to eat such foods, advertisers are trying to harm children. They're not suggesting that kids eat sweetened food to the exclusion of anything else."

Does Bell think self-regulation's scope should be expanded to examine issues such as nutrition and health? "Certainly not. If you say, 'Well, this ad is truthful, but we just don't want that product advertised, or not at this time to that audience,' you get into social engineering and policy questions, questions of taste. "The reason NARB restricts itself is that questions of taste are too difficult to administer. NAD and NARB provide a safety valve through the white papers and consultive panels, to have an outlet to express views on broad, general questions that cannot be measured under the basic truth and accuracy tests."

Mark Miller

A healthier climate for vitamin marketers

Vitamins are finally coming out of the closet.

Supplementary dietary aids, long the topic of considerable controversy, are gaining a much sought-after legitimacy in the marketplace.

After surviving governmental attempts to put vitamin availability and marketing under stiff regulation, vitamin producers are now finding there is a shift in the scientific and medical attitude toward vitamin supplements. These changes are marked by substantial increases in advertising budgets and an optimistic attitude toward the future of the industry.

Media expenditures for vitamins and food supplements increased last year by 14% from $44 million to $55 million, as measured by Leading National Advertisers.

In past decades, vitamins were viewed primarily as a deficiency disease preventative. The question was how much of a given vitamin is needed to avoid the development of deficiency diseases such as scurvy or beri-beri.

Recent studies of the way vitamins function in the body at microscopic levels confirm the dietary convictions held by a true believer two decades ago.

A measure of the new acceptance being given vitamins can be taken from the Hoffman-LaRoche campaign which supports vitamins in general as desirable food supplements.

The giant Swiss drug corporation is a supplier to the industry but doesn't have any over-the-counter brands of its own in the marketplace.

Hoffman-LaRoche is putting its weight behind a "fitness campaign" which delineates a role for nutrition, and by implication, vitamin supplements, in overall lay health maintenance programs.

The most recent research indicates that the role of vitamins in health maintenance isn't yet completely understood. Vitamin E has been shown to have a role in the reduction of pain, size of cysts and the causal hormonal imbalance in cystic mastitus in women, in work done by Dr. Robert London, at Sinai Hospital in Baltimore. Vitamin E has also been shown to convert low density cholesterol to high density, a more benevolent form.

Vitamin C, in preliminary studies, has been shown to increase the effectiveness of chemotherapy on tumors in preliminary research by Dr. K. H. Kresod, in Denver.

Dr. Myron Brin, a researcher investigating the effects of vitamins on health, suggests that they "protect the internal environment of the human being against threats from the external environment."

As this data finds its way to the general public, it is expected to spawn greater acceptance of vitamins as dietary insurance for good health. The perception now is shifting in a direction favorable to vitamin marketers.

Vitamins are now being taken by 41% of the population over the age of 16, according to a benchmark national survey of U.S. exercise-nutrition-health habits conducted by Trost As-

VITAMIN
E
VITAMIN
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DICK HODGINS

Purveyors of vitamins have gradually come out from under a cloud of negative perception, and are now investing strongly in media. A 15% increase in media billing, and several news brands presage a strong decade ahead.

sociates for Hoffman-LaRoche. The report also states that "Daily consumption is reported by considerably more women than men and is more prevalent in the older age group."

The Trost research also indicates that as much as 50% of the adult population is not getting the minimum daily requirement of at least one vitamin or mineral.

The vitamin market is highly segmented. Direct marketing houses, such as Nutrition Headquarters, in Carbondale, Ill., rely on price appeal mostly through magazines and Sunday supplements. Femiron is positioned against dieting young women, as is AYDS. Theregram, with spokeswoman Billie Jean King, makes an appeal to physically active people.

The target vitamin consumer tends to be upscale, better educated, and over 25, with a skew toward a female audience. Much of the magazine advertising for vitamins runs in women's service books, and in newsweeklies and personality publications.

Vitamin marketing spans a variety of merchandising and advertising techniques. Most of the major brands are sold primarily at retail outlets, but direct marketing also plays a large role. The San Francisco based Shaklee organization has built what it contends is the biggest share of the business without any commissionable advertising. Catalogues and brochures are the brand's only advertising.

Amway markets vitamins through a door-to-door sales force, which is supported by a general image and awareness media effort.

Both the retail and direct marketing approach to vitamin sales are taken by the A. H. Robins Co., of Richmond, Va. Robins retails the Allbee brand, and pushes its Z-BEC brand mostly through a direct marketing campaign. Dan Shepard, product manager at Robins for vitamins, explained how the two campaigns work.

The Allbee brand was launched in the last week of 1979 with a $320,000 flurry of spot television. That was the prelude for a strong 1980 campaign backed by $5,328,000 in spot tv, and $193,900 in magazines.

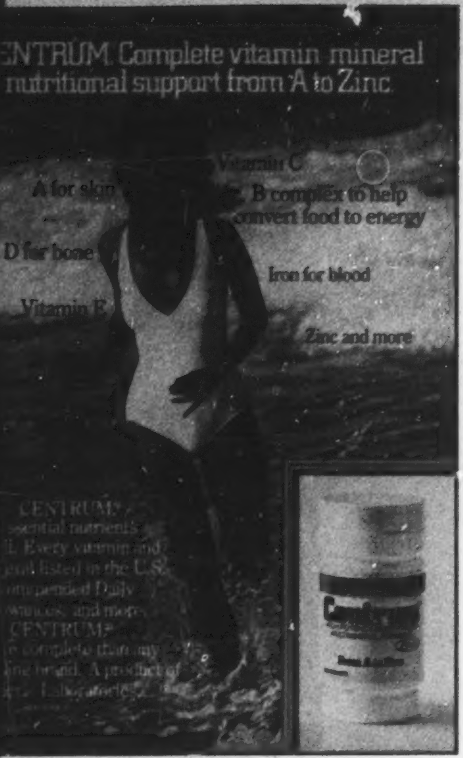
"We use spot tv instead of network because it gives us the maximum in flexibility, and because there are pockets of very heavy vitamin usage. For instance, the Pacific coast region is the highest vitamin consuming area in the nation," Shepard said.

Copy for Allbee describes it as "An extra strength vitamin for extra effort people."

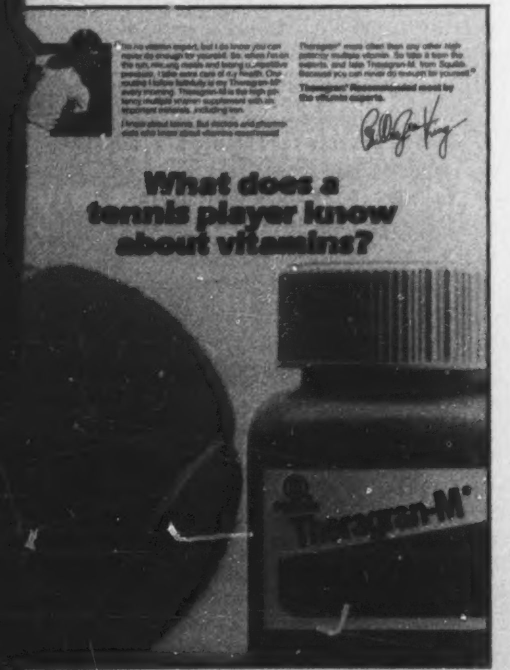
The product comes in two forms — C800, positioned against upscale men and women 18 to 40, and C800+Iron, which is positioned only against a female target audience.

Magazine space, Shepard said, "is utilized as support advertising. We employ an editorial column style format, written by Caroline Davis for *Reader's Digest*, and a column by Mary Willis, which appears in women's service magazines.

Shepard said the budget for Allbee is increasing 15% in 1981, which puts


ENTRUM. Complete vitamin mineral nutritional support from A to Zinc
Vitamin C
A for skin
B complex to help convert food to energy
D for bone
Iron for blood
Vitamin E
Zinc and more
CENTRUM

Most vitamin ads are slanted toward women, who are the primary users of vitamin supplements. Most vitamin advertising depicts adults in action situations which lead to stress and exertion. Television is the favored medium but magazines and Sunday supps play a strong role.



it at about $6.3 million, competitive with Miles One-A-Day and Flintstones brands.

The Robins direct marketed brand is the water soluble Z-BEC. It was supported with $482,000 in magazines last year, with space in high circulation magazines, including *Sports Illustrated* and *Playboy*.

Comparing and contrasting the two approaches toward advertising vitamins, Shepard said, "Each method has its plusses and minuses. Z-BEC was much slower on the uptake than it would have been with television. It's been on the market about four years, and now we're beginning to see some healthy increases coming off a good base.

"Allbee is now building a good base," although at a much higher cost than for the slower start of Z-BEC.

But these two distinct media approaches may be melded in the near future, he indicated. "We're now looking at adding print to the Allbee tv campaign, and adding tv to the print campaign for Z-BEC, if these options prove to be economically feasible."

There is also the option of no advertising. Robins goes that route for Allbee with C, which relies for distribution and demand largely on a physician information program and the pharmaceutical sales force.

In the food supplement category, there is one brand that isn't strictly speaking, a vitamin product, but nonetheless overshadows the category with its dominant media presence. That is Nabisco's often joked about geriatric supplement, Geritol.

Last year, Geritol spent $10,706,800 in LNA measured media, accounting for nearly 20% of the category expenditures.

But even with that expenditure, Geritol was not the presence in the market it was in 1979 when it spent $16.2 million, 33% of the category total.

Geritol marketing executives are mum about the causes and implications of the one third spending cut and the changes in media allocations which took place last year.

In 1979, Geritol spend $10.5 million on Geritol liquid and tablets, $2.7 million on megavitamins, and $2.7 million on Geritol tablets. Last year the allocation of funds showed $1.6 million budgeted for liquid and tablets, $690,000 for megavitamins, and $8 million for Geritol tablets.

J. B. Williams Company, the Nabisco affiliate that manufactures Geritol, isn't talking about the reasons for these severe budget cuts and allocations, but it does appear unusual that such cuts would be made at a time when the population is aging. The most obvious but not necessarily correct conclusion is that sales are faltering. Management, however, may have wanted a better profit picture and chose to make cuts in media allocations to achieve that aim.

If reduced advertising expenditures continue in 1981, it might well indicate some shifts in dietary supplement purchasing habits by the older segment of the population.

The most recent Geritol commercials suggest that the brand has lowered its age demographic and is now appealing to active women in their early thirties.

Another major presence in the category is Miles Laboratories with its three heavily advertised brands: Core C, Flintstones and One-A-Day.

Core C is the most recent brand introduction, and was put on the market last year with national distribution. First year media expenditures totaled $2,322,600 in LNA measured media. Of that, $2,287,700 went into network television, and $35,600 into spot tv.

It appeared that most of the Core C media budget came out of One-A-Day support. The media total for One-A-Day was down from $9,056,400 in 1979 to $7,357,000 last year.

Flintstones, aimed at mothers as a vitamin supplement for children, continues to get aggressive media support from Miles, and is the only one of the three Miles brands that were placed in magazines.

Miles is non-communicative about marketing for its vitamin products, but a spokesman said that the company "takes a traditional package goods marketing approach to the vitamin product field."

American Cyanamid, through its Lederle Laboratories, markets two heavily advertised high potency multiple vitamin formulas, Centrum, and

Continued on page 155

Stresstabs. Last year, Stresstabs got most of the media support, $5,010,700, while Centrum got about half as much, $2,564,700. Both brands were strong in magazines, but only Stresstabs got time on network television.

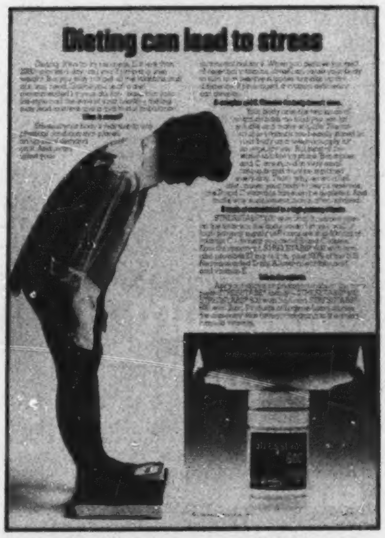
Stresstabs takes a multiple copy approach, appealing to the effects of stress on dieting women, in women's magazines, and the stress experienced by men in the business world, in newsweeklies. The visual image of a candle burning at both ends is used to convey the idea of stress and poor nutrition as contributing to health conditions that require the addition of a vitamin supplement.

Centrum is marketed as a vitamin and mineral "nutritional support" and uses visuals aimed at a younger demographic than Stresstabs. The media mix, magazines and spot tv, suggests that the brand is marketed on the basis of its regional strengths.

Squibb was another pharmaceutical company that took the vitamin market more seriously last year. The media budget for its primary brand, Therogram, was more than doubled last year, to $3,705,400. That increase also expanded the brand's media mix, which has been restricted to spot television in 1979.

Last year, Therogram moved heavily into network television, with a $3,300,700 budget, while spot tv was cut back from $1,828,300 to $8,500. Magazines were also added to the mix.

Nutrition Headquarters, a direct marketer, increased its media expenditures last year. The Carbondale Ill. company added considerably to its Sunday supplement expenditure, increasing it from $1,616,500 to $2,300,100, and magazines from $31,900 to $104,900.


Dieting can lead to stress

Vitamin loss through dieting is a common theme in much vitamin magazine advertising.

Nutrition Headquarters also engages in a substantial direct mail campaign, and may well spend double the amount on catalogue mailings that it does on commissionable media. Price is the primary message in most Nutrition Headquarters copy, plus an extensive list of fairly exotic nutritional and skin care supplements.

Unicap, the vitamin brand from Upjohn, gained the distinction last year of being the only major vitamin marketer to use network radio. More than half its $1,074,100 budget was invested in network radio, $716,000, according to LNA. Upjohn marketing executives declined to comment on that media choice, but if they are after an older demographic and inexpensive reach, it is a defendable decision.

Warner Lambert uses a balanced media mix for its Nyadec brand. Of the $2,131,400 spent on media last year, $947,000 was invested in spot television, $709,600 in magazines, and $474,800 in network television.

With the introduction of two new brands last year, Allbee and Core C, a new era of optimism appears about to be dawning for vitamin marketers. These moves also presage a more competitive strategy for those marketers who are endeavoring to establish image and awareness in the face of expanding activity by price pitch direct marketing operations. It all adds up to a stronger media presence for serious vitamin marketers.

Fred Gardner

1980 media expenditures for vitamin supplements

Brand	Total	Magazines	Suppls	Network tv	Spot tv	Network radio
Centrum	$ 2,564,700	$1,315,800			$1,248,900	
Stresstabs	5,010,700	2,033,800		$1,889,200	1,087,200	
Core C	2,322,600			2,287,700	35,600	
Geritol	10,706,800	1,419,800	$ 630,500	6,936,500	1,720,000	
Flintstones	6,602,700	208,000		6,346,600	48,100	
One-a-day	7,357,000			6,757,900	599,100	
Nutrition Headqtrs	2,405,000	104,900	2,300,100			
Allbee	5,521,900	193,900			5,328,000	
Therogram	3,705,400	396,200		3,300,700	8,500	
Unicap	1,074,100	260,600	90,500		7,000	$716,000
Nyadec	2,131,400	709,600		474,800	974,000	

Source: Leading National Advertisers.

BEST COPY AVAILABLE

Maybelline
XEROX
NABISCO
GMC
Century 21
Kmart
TEXACO
Allstate
TWA
Johnson & Johnson
EXXON
Kent III
Lipton
Sears
Armstrong
Kodak
Nestlé
DATSUN
True Value
Ford
Whirlpool Home Appliances
Bell System
CLOROX 2
HONDA
MATTEL

10th Annual DIRECTORY OF TOP 200 BRANDS

National advertising expenditures by each brand in each of eight major media in 1979 and 1980

Key advertising decision makers for each brand in company marketing and agency media departments

Alphabetical index of 200 most-advertised brands in U.S.

Total expenditures of Top 200 in 1977, 1978, 1979, 1980

Analysis of major trends among the Top 200 Brands

Introduction to Top 200 Advertised Brands Directory

This report is the tenth annual report by *Marketing & Media Decisions* of major brand activity, brand expenditures in each of the eight major media and the key media decision-makers for each brand in the company and at their advertising agencies. Almost half the total dollars invested by national advertisers in the eighth major national media (magazines, supps, newspapers, network tv, spot tv, network radio, spot radio, outdoor) are covered.

Immediately below is an alphabetical index of brands giving the numerical position of each brand, ranked in order of total expenditures in two sections of the report. The first section shows brand, parent company, categories in which the brand spent most of its dollars, and total expenditures in each year 1977, 1978, 1979, 1980.

The second section gives individual media expenditures for each brand in 1979 and 1980, categories in which brand was most active (as defined by Leading National Advertisers), principal agencies, media decision-makers in companies and agencies.

The data is a special compilation by *Decisions* of best available expenditure estimates by Leading National Advertisers (LNA), Publishers Information Bureau (PIB), Broadcast Advertisers Reports (BAR), Media Records, Inc., Radio Expenditure Reports (RER), Radio Advertising Bureau (RAB), Institute of Outdoor Advertising and *Decisions* estimates. We have organized the data by basic brand names and combined variations of brand to make as complete a report as possible of competitive brand dollars.

Alphabetical index of brands and brand profiles

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Shell	148
Sony	130
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Subaru	172
Swift	182
TWA	53
Tab	198
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Texize	139
Tide	153
Time-Life	83
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Toyota	10
Triumph	97
True	142
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Tylenol	88
20th Century	124
U.S. Army	112
United Airlines	28
United Artists	195
Universal City	70
Vantage	18
Viceroy	147
Vicks	99
Virginia Slims	113
Volkswagen	29
Walt Disney	186
Wards	5
Warner	61
Wendy's	120
Whirlpool	196
Winston	26
Woolco	6
Wrigley	50
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Trends among top 200 advertised brands for 1980

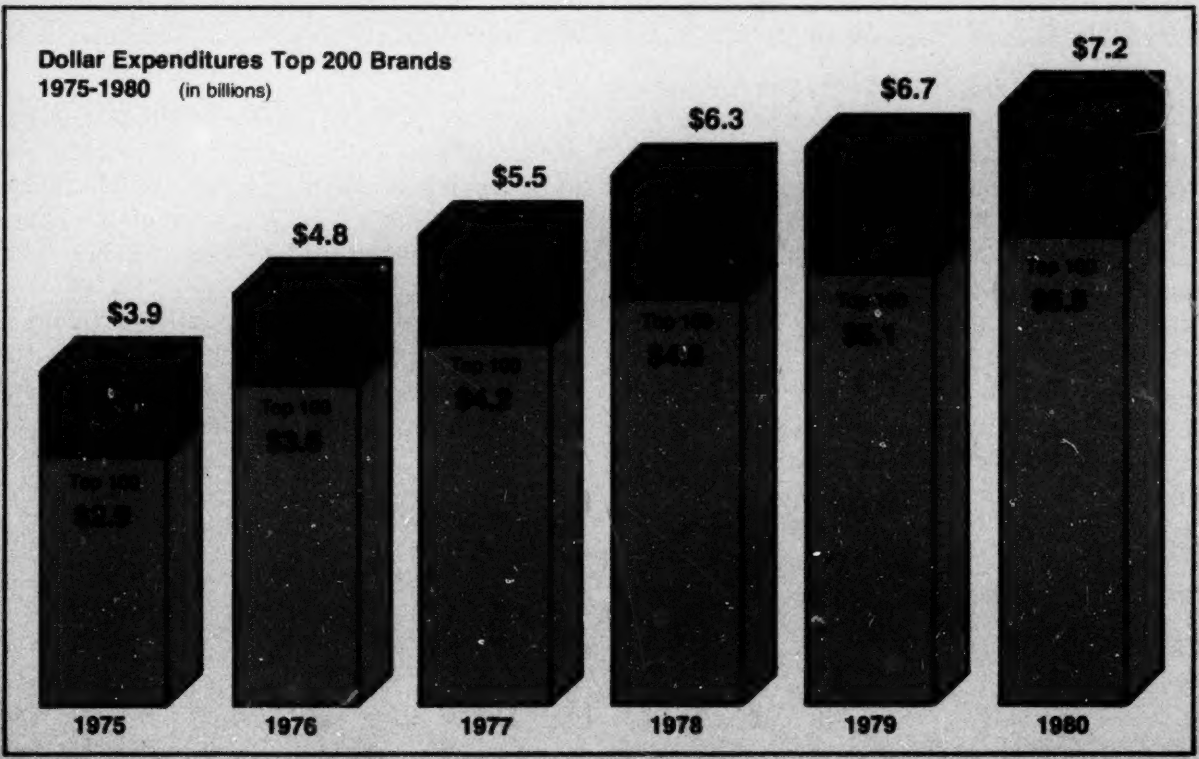
Budget boosts among the top 200 brands was about the same in 1980 as in the year before — 9.5% on average. In both 1979 and 1980 this was less than in the pre-recession years of 1976 (up 27.5%), 1977 (up 17%), 1978 (up 15%) among the most advertised brands.

The increase in media expenditures of the top 200 almost matched price increases — budgets up 9.5%, prices up 9.9%. This did not represent a real increase in amount of advertising used. It did represent a holding action (at higher prices) in a doubtful year.

Entry fee required to be listed as one of the top 200 advertised brands rose from $12,012,000 in 1979 to $13,658,000 in 1980. The average increase to make the list was 13.5% over the year before. Advertisers down the list tended to up budgets more than those at the very top.

28 new brands made the top 200 list. The brands in the list this year that were not included in the 1979 list are: Arco gas and oil, Black & Decker, Brim coffee, Cambridge cigarettes, Carte Blanche/Citicorp, Dexatrim, Dial soap, Doral cigarettes, Gulf Oil, Hallmark greeting cards, Head & Shoulders shampoo, High Point coffee, Kleenex tissues, Long John Silver restaurants, Luv's diapers, Natural Light beer, Now cigarettes, Oscar Mayer meats, Pert shampoo, Porcelana skin cream, Renault passenger cars, Stouffer's restaurants and foods, Subaru passenger cars, Swift meats, Triumph cigarettes, United Artists motion pictures, Virginia Slims cigarettes, Parker Bros. games.

Dropouts from the top 200 list in 1980 were: American Consumer, Arctic Lights, Avon, Borden's, Carpet Fresh, Cheer, Cheerios, Country Time, Cycle, Firestone, Geritol, Ideal toys, Listerine, Mazzola, Mego, 9-Lives, Olympus, Oven Fry, Paramount, Paul Mason, Scope, Scott, Shake 'n Bake, Stove Top, Sure, Taster's Choice, Wondra, Woolite. A few of these brands cut back drastically on their expenditures. Most of the drop-outs simply did not keep pace with media price rises. There were also some newly aggressive big spenders coming in who made it harder for some oldtimers to keep pace on a fast track.



Battlegrounds among the biggies are now in beer, movies and airline travel. The fighting stimulated some budget boost.

New movies were plugged aggressively by Columbia, Universal City/MCA, Warner Communications (each up about 50%), and United Artists (budget almost tripled in 1980).

The beer barons jousting included Miller (up 27%), Budweiser (up 42%), Coors (up 37%). Anheuser-Busch's relatively new Natural Light was boosted to over $20 million in 1980.

Among the airlines United, American, Eastern, Delta, TWA all felt required to add considerably to expenditures as the market heated up through deregulation — and had to raise prices.

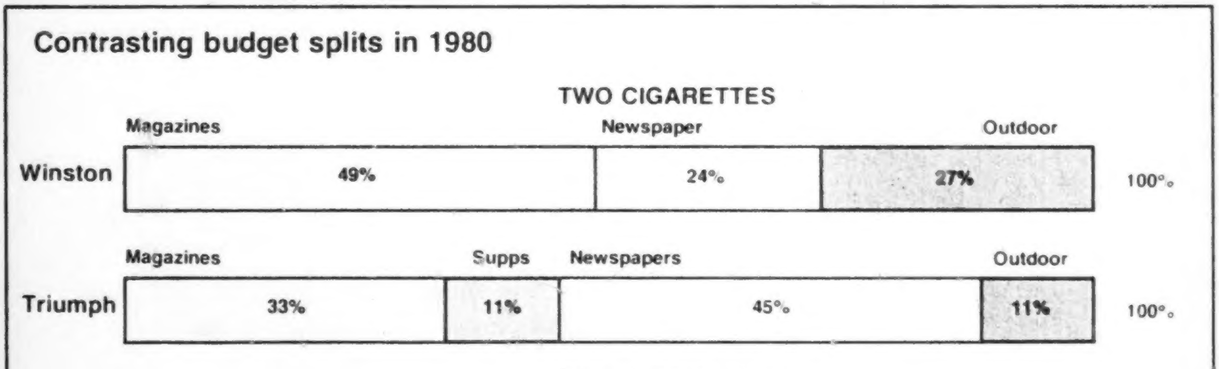
In-and-outers in the top 200 list in 1980 included only one brand that was on the list in 1978, out in 1979, back on in 1980 — Gulf Oil.

There were 11 brands that joined the top 200 in 1979, but briefly, and were out again in 1980: Arctic Lights, Carpet Fresh, Cheerios, Firestone, 9-Lives, Paul Mason, Stove Top, Taster's Choice, Olympus, Oven Fry, Wondra.

Thirteen leaders stayed at the top of the list, but with some shifts in order of listing, in 1980. They included the four largest chains with their own labels; the big three automotives — Ford, Chevrolet, Toyota; AT&T; big mac McDonald's; and three packaged foods leaders — Kellogg's, Ralston Purina and Kraft.

Share of total expenditures in the eight major media that the top 200 brands accounted for in 1980 held at about half the total. The eight media total for the top 200 was $7,246,826,000. Expenditures in national time and space in the eight media by all advertisers was $15,260,000,000. If you get even more exclusive and just look at the top 100 brands, you get an eight media total of $5,468,469,000 — about 36% of all dollars in those national media.

What's a brand? We'll never get everybody to agree on what should be defined as a brand, but we're getting closer. This is the tenth annual top brand expenditure report, and it's accepted now as official. We have also over the years incorporated reader requests into the reports. The basic definition we go by is "all advertising put behind a brand name:" Post cereals, for example, out of General Foods; the varied food products marketed under the Kraft label; the paints, apparel fabrics, auto accessories and other manufactured products sold under the Du Pont banner; everything advertised as a Sears product; many types of insurance; but Viceroy cigarettes by itself (BAT Industries).


Contrasting budget splits in 1980

Top 200 Millionaire Brands 1977-1978-1979-1980

BRAND NAME (AND PARENT COMPANY)	CLASSIFICATION	1977	1978	1979	1980
1. **Sears** (Sears Roebuck)	Retail	$ 430,048,000	$ 501,450,000	$ 405,835,000	$ 442,160,000
2. **K-Mart** (K-Mart)	Retail	218,002,000	231,245,000	244,365,000	304,050,000
3. **Penney's** (J.C. Penney)	Retail	185,164,000	245,623,000	250,979,000	259,170,000
4. **Ford** (Ford Motor)	Cars, trucks	106,266,000	163,184,000	175,264,000	157,763,000
5. **Wards** (Mobil Corp.)	Retail	132,268,000	149,794,000	159,821,000	166,600,000
6. **Woolco** (F.W. Woolworth)	Retail	111,505,000	113,416,000	131,886,000	151,000,000
7. **Chevrolet** (General Motors)	Cars	131,231,000	150,924,000	161,123,000	138,741,000
8. **At&T/Bell** (AT&T)	Communications	69,365,000	68,359,000	93,050,000	136,515,000
9. **McDonald's** (McDonald's Corp.)	Restaurants	98,016,000	118,016,000	142,569,000	130,862,000
10. **Toyota** (Toyota Motors)	Cars, trucks	48,459,000	70,110,000	67,203,000	91,707,000
11. **Kellogg's** (Kellogg Co.)	Cereals	61,716,000	67,293,000	79,528,000	85,428,000
12. **Purina** (Ralston Purina)	Pet foods, feeds, pest control	56,188,000	62,394,000	76,890,000	78,824,000
13. **Kraft** (Kraft, Inc.)	Cooking, dairy, prepared foods	61,524,000	72,192,000	74,470,000	77,785,000
14. **Miller** (Philip Morris)	Beer	32,317,000	50,444,000	59,237,000	76,234,000
15. **GE** (General Electric)	Appliances, radio, tv	54,768,000	52,944,000	62,701,000	71,896,000
16. **Salem** (R.J. Reynolds)	Cigarettes	33,294,000	36,620,000	48,193,000	66,831,000
17. **Datsun** (Nissan Motors)	Cars, trucks	54,101,000	61,818,000	65,477,000	65,711,000
18. **Vantage** (R.J. Reynolds)	Cigarettes	34,089,000	30,269,000	46,176,000	59,689,000
19. **Chrysler** (Chrysler)	Cars	58,952,000	55,952,000	47,170,000	57,035,000
20. **Kent** (Loews)	Cigarettes	32,261,000	42,184,000	55,205,000	56,063,000
21. **Merit** (Philip Morris)	Cigarettes	41,961,000	43,806,000	51,777,000	55,640,000
22. **Pepsi-Cola** (PepsiCo)	Soft drinks	43,700,000	45,819,000	57,186,000	55,001,000
23. **Kodak** (Eastman Kodak)	Cameras, film	52,758,000	53,325,000	60,090,000	54,400,000
24. **Budweiser** (Anheuser-Busch)	Beer	27,116,000	28,719,000	36,518,000	49,032,000
25. **Marlboro** (Philip Morris)	Cigarettes	38,700,000	43,180,000	45,388,000	48,678,000

Sources

Consumer magazines and supps: data summarized from the PIB Magazine Analysis prepared by Leading National Advertisers (LNA) of actual linage run in those media. Expenditures are based on current one-time gross rates before discounts. Rates for national full-run insertions are based on ad size and coloration. Rates for regional and less than full-run insertions are determined by LNA editors on circulation and rates supplied by the magazines. Covered are almost 100 consumer magazines and four national supps, plus tear sheets of over 1,500 regional editions a year.

Newspapers: data compiled by Media Records, which measured every ad in 221 daily and Sunday newspapers. Actual linage is multiplied by the one-time general open line rate as of January 1980. Dollar estimates include newspaper supps, preprinted inserts, comics, rotogravure, all color ads. Data is estimated to cover 82% of national newspaper linage. *Marketing & Media Decisions* has added estimates of local expenditures in newspapers by the five leading chain retailers because the extent of their operations makes their brands, in effect, "nationally" advertised as well as distributed.

Network tv and network radio: data secured by Broadcast Advertisers Reports (BAR), which monitors all network broadcasts except those of the Mutual radio network. Material is collected on audio tape and then translated into a sequential listing. Network tv and network radio rates are based on estimates provided by the three networks of per-minute cost for time and talent.

Spot tv: data secured by Broadcast Advertisers Reports (BAR) from listening posts in 75 top markets that monitor 260 stations for one week each month. These weekly records are projected to estimates of monthly spot tv usage. Spot tv rates are applied from a station rate deck that is constantly updated by agency buyers. The estimates represent about 90% of the dollars in spot tv.

Spot radio: data generated by Radio Expenditure Reports (RER) is calculated from a sample of 800 stations in 150 markets. RER's sources are 11 radio reps handling station groups which supply quarterly computer runs by station, by market, by brand of spots aired — plus similar reports from stations in 150 markets. Expenditures are projected to an adjusted national gross figure based on a formula provided by Radio Advertising Burau (RAB). Estimates cover about 80% of total national spot radio.

Outdoor: data is based on information submitted to Leading National Advertisers (LNA) at the request of the Institute of Outdoor Advertising by outdoor plant operators in markets of 100,000 population or over. Covered is about 80% of total national outdoor advertising expenditures.

Brand dollar estimates are retabulated by *DECISIONS* by major brand name from the data just described. This represents the one place where the data from all these sources are presented together. The brand data in greater detail is also available from each of the organizations that compile the data. Leading National Advertisers publishes detailed listings of the information on magazines, supps, network tv, spot tv, network radio, and outdoor. References to LNA classifications are provided throughout this report for further reference in LNA's reports: Company/Brand $; Class/Brand $.

Top 200 Millionaire Brands 1977-1978-1979-1980

BRAND NAME (AND PARENT COMPANY)	CLASSIFICATION	1977	1978	1979	1980
26. **Winston** (R.J. Reynolds)	Cigarettes	$ 44,826,000	$ 38,573,000	$ 59,230,000	$ 48,344,000
27. **Clairol** (Bristol-Myers)	Hair products, toiletries	49,921,000	53,338,000	59,737,000	47,487,000
28. **United** (UAL)	Passenger travel	26,233,000	40,467,000	37,008,000	47,377,000
29. **Volkswagen** (Volkswagenwerk)	Passenger cars	32,641,000	33,395,000	30,915,000	46,063,000
30. **Now** (R.J. Reynolds)	Cigarettes	14,540,000	9,313,000	10,057,000	45,578,000
31. **Mercury** (Ford Motor)	Passenger cars	28,092,000	34,446,000	30,870,000	45,534,000
32. **Maxwell House** (General Foods)	Coffee	16,039,000	34,011,000	51,011,000	45,090,000
33. **Burger King** (Pillsbury)	Restaurants	27,233,000	36,607,000	45,109,000	45,075,000
34. **Coca-Cola** (Coca-Cola)	Soft drinks	29,424,000	40,956,000	46,364,000	44,988,000
35. **Anacin** (Amer. Home Products)	Medicines	33,981,000	34,290,000	39,671,000	43,513,000
36. **Dodge** (Chrysler)	Passenger cars	64,836,000	75,396,000	62,640,000	43,124,000
37. **Seagram's** (Seagram)	Liquors	18,582,000	41,627,000	43,151,000	42,366,000
38. **American** (American Airlines)	Passenger travel	25,109,000	25,267,000	29,132,000	41,958,000
39. **Oldsmobile** (General Motors)	Passenger cars	29,520,000	33,904,000	29,195,000	41,673,000
40. **GMC** (General Motors Corp.)	Cars	34,765,000	54,550,000	52,575,000	41,125,000
41. **DuPont** (E.I. DuPont)	Paints, fabrics, auto access.	13,269,000	19,423,000	34,166,000	40,609,000
42. **Johnson's** (Johnson & Johnson)	Hair care, baby products	26,151,000	35,180,000	35,734,000	40,298,000
43. **Eastern** (Eastern Air Lines)	Passenger travel	25,541,000	22,326,000	29,216,000	40,182,000
44. **Buick** (General Motors)	Passenger cars	33,596,000	45,618,000	36,114,000	39,931,000
45. **American Express** (Amer. Ex.)	Financial, travel	22,089,000	36,999,000	33,811,000	37,723,000
46. **Polaroid** (Polaroid)	Cameras, film	26,068,000	40,955,000	38,241,000	37,334,000
47. **ABC** (American Broadcasting)	Tv, radio stations	19,976,000	26,890,000	31,572,000	36,972,000
48. **Pontiac** (General Motors)	Passenger cars	35,596,000	39,565,000	37,686,000	36,664,000
49. **Columbia** (Columbia Pictures)	Motion pictures	12,525,000	14,249,000	24,073,000	36,317,000
50. **Wrigley** (Wm. Wrigley, Jr.)	Gum	29,114,000	40,415,000	43,516,000	35,617,000
	Top 50 totals	**$2,933,436,000**	**$3,466,840,000**	**$3,641,921,000**	**$4,027,757,000**

51. **Delta** (Delta Airlines)	Passenger travel	$ 25,488,000	$ 26,370,000	$ 29,832,000	$ 34,897,000
52. **Nestle** (Nestle)	Confectionery, beverages, cooking	29,986,000	42,207,000	46,169,000	34,501,000
53. **TWA** (Trans World Airlines)	Passenger travel	25,750,000	23,422,000	25,887,000	34,492,000
54. **Gillette** (Gillette)	Personal hygiene, hair care	31,101,000	30,174,000	31,160,000	34,135,000
55. **Honda** (Honda Motors)	Cycles, cars	19,576,000	31,645,000	26,592,000	33,949,000
56. **Michelob** (Anheuser-Busch)	Beer	10,304,000	19,061,000	33,765,000	33,623,000
57. **Sanka** (General Foods)	Coffee	7,719,000	14,241,000	21,552,000	33,428,000
58. **Post** (General Foods)	Cereal	35,164,000	32,077,000	28,298,000	33,390,000
59. **NBC** (RCA Corp.)	Tv, radio stations	15,074,000	21,367,000	26,533,000	33,285,000
60. **Pillsbury** (Pillsbury)	Bakery, cooking, prepared foods	32,356,000	28,878,000	39,615,000	32,834,000
61. **Warner** (Warner Communications)	Amusements	13,643,000	21,670,000	21,792,000	32,766,000
62. **Seven-Up** (Philip Morris)	Soft drinks	16,226,000	21,528,000	28,589,000	31,927,000
63. **Cambridge** (Philip Morris)	Cigarettes	—	—	—	31,860,000
64. **Kool** (BAT industries)	Cigarettes	35,715,000	33,851,000	28,849,000	31,755,000
65. **Oil of Olay** (Richardson-Merrill)	Cosmetics	20,137,000	18,096,000	15,542,000	31,738,000
66. **CBS** (CBS, Inc.)	Tv, radio stations	14,262,000	22,233,000	30,729,000	31,591,000
67. **Camel** (R.J. Reynolds)	Cigarettes	7,009,000	34,049,000	40,679,000	31,165,000
68. **American Motors** (Amer. Motors)	Passenger cars	33,813,000	44,781,000	48,971,000	31,146,000
69. **Kentucky Fried Chicken** (Heublein)	Restaurants	30,693,000	29,511,000	32,633,000	30,998,000
70. **Universal City** (MCA, Inc.)	Amusements	9,425,000	21,075,000	20,753,000	30,939,000

Top 200 Millionaire Brands 1977-1978-1979-1980

BRAND NAME (AND PARENT COMPANY)	CLASSIFICATION	1977	1978	1979	1980
71. **Lipton** (Lever Bros.)	Prepared foods, beverages, cooking	$ 20,179,000	$ 22,060,000	$ 27,566,000	$ 30,933,000
72. **Mazda** (Toyo Kogyo)	Cars, trucks	15,165,000	20,599,000	28,427,000	30,918,000
73. **RCA** (RCA)	Tv sets, records	29,480,000	34,582,000	30,541,000	30,857,000
74. **Benson & Hedges** (Philip Morris)	Cigarettes	28,927,000	30,056,000	30,630,000	30,773,000
75. **Carlton** (American Brands)	Cigarettes	20,214,000	20,041,000	33,402,000	30,433,000
76. **Columbia** (CBS)	Records	28,793,000	31,674,000	29,154,000	29,918,000
77. **Revlon** (Revlon)	Cosmetics, hair care	33,349,000	27,526,000	29,547,000	28,940,000
78. **Jell-O** (General Foods)	Desserts	22,898,000	21,374,000	28,073,000	28,897,000
79. **Schlitz** (Jos. Schlitz)	Beer	37,593,000	40,910,000	44,292,000	28,817,000
80. **Levi's** (Levi-Strauss)	Apparel	12,003,000	14,165,000	29,437,000	28,736,000
81. **Crest** (Procter & Gamble)	Toothpaste	19,400,000	23,144,000	26,682,000	28,649,000
82. **Canon** (Canon, Inc.)	Cameras	6,530,000	11,816,000	18,012,000	28,244,000
83. **Time-Life** (Time, Inc.)	Books, records, magazines	24,796,000	31,595,000	41,563,000	28,219,000
84. **Plymouth** (Chrysler Corp.)	Passenger cars	24,556,000	40,405,000	18,265,000	27,970,000
85. **Folger** (Procter & Gamble)	Coffee	13,380,000	31,903,000	34,392,000	27,676,000
86. **Nabisco** (Nabisco)	Bakery, prepared foods, confectionery	20,871,000	22,349,000	24,262,000	27,317,000
87. **Ivory** (Procter & Gamble)	Soaps	22,557,000	24,457,000	27,811,000	26,584,000
88. **Tylenol** (J&J)	Medicines	12,721,000	16,988,000	23,670,000	26,495,000
89. **Maybelline** (Schering-Plough)	Cosmetics	18,466,000	22,743,000	25,657,000	26,246,000
90. **Mattel** (Mattel)	Toys	30,390,000	27,615,000	26,267,000	25,436,000
91. **Cadillac** (General Motors)	Passenger cars	17,703,000	17,856,000	23,650,000	25,137,000
92. **Kotex** (Kimberly-Clark)	Feminine hygiene	13,689,000	14,660,000	12,012,000	25,072,000
93. **Coors** (Adolph Coors Co.)	Beer	6,358,000	12,006,000	18,017,000	24,738,000
94. **High Point** (Procter & Gamble)	Coffee	1,185,000	1,218,000	12,258,000	24,476,000
95. **IBM** (Inter. Bus. Machines)	Office machines	17,646,000	21,485,000	26,567,000	24,427,000
96. **Cover Girl** (Noxell)	Cosmetics	17,501,000	19,579,000	22,632,000	24,042,000
97. **Triumph** (Loews Corp.)	Cigarettes	—	208,000	25,473,000	23,710,000
98. **Bayer** (Sterling Drug)	Medicines	17,995,000	22,510,000	25,072,000	23,519,000
99. **Vicks** (Richardson-Merrill)	Medicines	17,592,000	22,588,000	21,679,000	23,509,000
100. **Franklin Mint** (Franklin Mint)	Mail order	17,293,000	18,877,000	18,791,000	23,503,000
	Top 100 totals	**$3,916,107,000**	**$4,650,110,000**	**$5,003,662,000**	**$5,463,469,000**

BRAND NAME (AND PARENT COMPANY)	CLASSIFICATION	1977	1978	1979	1980
101. **Lincoln** (Ford Motor)	Passenger cars	$ 12,342,000	$ 18,690,000	$ 13,427,000	$ 23,440,000
102. **Arco** (Atlantic Richfield)	Gas, oil	1,294,000	1,328,000	13,491,000	23,372,000
103. **Gallo** (E/J Gallo)	Wine	12,628,000	14,883,000	16,859,000	23,224,000
104. **Betty Crocker** (General Mills)	Cooking, prepared foods	37,363,000	38,935,000	34,364,000	22,370,000
105. **Kool-Aid** (General Foods)	Soft drinks	18,712,000	21,293,000	23,264,000	22,254,000
106. **Texaco** (Texaco)	Gas, oil	14,116,000	13,768,000	14,660,000	21,975,000
107. **Crisco** (Procter & Gamble)	Cooking products	13,729,000	15,806,000	17,175,000	21,486,000
108. **Gaines** (General Foods)	Dog food	21,793,000	19,303,000	25,345,000	21,364,000
109. **Aqua-Fresh** (Beecham)	Toothpaste	1,038,000	2,985,000	19,305,000	21,254,000
110. **Dristan** (Amer. Home Products)	Medicines	20,539,000	23,086,000	24,262,000	21,186,000
111. **Xerox** (Xerox Corp.)	Office machines	10,590,000	17,218,000	15,165,000	21,148,000
112. **U.S. Army** (U.S. Army Recruit. Serv)	Recruitment	15,449,000	13,405,000	16,680,000	21,134,000
113. **Virginia Slims** (Philip Morris)	Cigarettes	8,526,000	10,366,000	19,882,000	21,078,000
114. **Ragu** (Chesebrough-Ponds)	Sauces	7,614,000	11,557,000	13,281,000	20,993,000
115. **Allstate** (Sears, Roebuck)	Insurance	18,785,000	18,541,000	18,953,000	20,990,000

Top 200 Millionaire Brands 1977-1978-1979-1980

BRAND NAME (AND PARENT COMPANY)	CLASSIFICATION	1977	1978	1979	1980
116. **L'eggs** (Consolidated Foods)	Stockings	$ 16,752,000	$ 10,734,000	$ 14,077,000	$ 20,870,000
117. **Milton Bradley** (Milton Bradley)	Games	9,603,000	11,697,000	26,664,000	20,708,000
118. **True Value** (Cotter & Co.)	Hardware stores	7,808,000	11,462,000	19,394,000	20,676,000
119. **Carte Blanche** (Citicorp)	Financial	79,000	147,000	5,307,000	20,597,000
120. **Wendy's** (Wendy's International)	Restaurants	8,695,000	19,402,000	20,249,000	20,555,000
121. **Natural Light** (Anheuser-Busch)	Beer	—	—	17,586,000	20,740,000
122. **Birds Eye** (General Foods)	Fruits, vegetables, prepared foods	18,762,000	20,883,000	24,885,000	20,276,000
123. **Colgate** (Colgate-Palmolive)	Personal hygiene, soaps, polishes	19,790,000	21,567,000	29,097,000	20,162,000
124. **20th Century** (20th-Fox)	Motion pictures	10,327,000	16,273,000	21,944,000	19,937,000
125. **Pabst** (Pabst Brewing)	Beer	13,043,000	19,980,000	18,586,000	19,842,000
126. **Exxon** (Exxon)	Gas, oil	28,399,000	28,592,000	15,228,000	19,549,000
127. **Lowenbrau** (Philip Morris)	Cigarettes	13,011,000	16,483,000	17,242,000	19,522,000
128. **Alka Seltzer** (Milles Labs.)	Medicines	16,649,000	21,431,000	24,259,000	19,502,000
129. **Lysol** (Sterling Drug)	Disinfectants, cleaners	21,122,000	19,964,000	21,334,000	19,288,000
130. **Sony** (Sony Corp.)	Tv sets, phonographs	13,076,000	12,727,000	20,610,000	19,247,000
131. **Pampers** (Procter & Gamble)	Diapers	18,077,000	18,859,000	21,953,000	19,087,000
132. **Playtex** (Esmark)	Bras, girdles, feminine hygiene	26,619,000	28,813,000	19,922,000	19,078,000
133. **Minolta** (Minolta Corp.)	Cameras	4,367,000	12,691,000	17,056,000	19,052,000
134. **Goodyear** (Goodyear)	Tires	20,254,000	17,937,000	20,458,000	18,947,000
135. **Busch** (Anheuser-Busch)	Beer	13,918,000	20,821,000	20,085,000	18,840,000
136. **Campbell's** (Campbell Soup)	Prepared foods, vegetables	23,154,000	18,660,000	21,174,000	18,684,000
137. **Clorox** (Clorox)	Laundry preparations	16,051,000	17,118,000	16,612,000	18,611,000
138. **Kenner** (General Mills)	Toys	20,800,000	19,840,000	25,289,000	18,529,000
139. **Texize** (Morton-Norwich)	Cleaners, laundry preparations	14,482,000	17,227,000	16,282,000	18,446,000
140. **Mobil** (Mobil Oil)	Gas, oil	17,957,000	19.250,000	17,948,000	18,392,000
141. **Safeway** (Safeway Stores)	Retail foods	14,865,000	16,896,000	18,709,000	18,291,000
142. **True** (Loews)	Cigarettes	12,498,000	15,873,000	18,253,000	18,270,000
143. **Pizza Hut** (PepsiCo)	Restaurants	9,580,000	14,335,000	14,411,000	18,262,000
144. **Luv's** (Procter & Gamble)	Diapers	441,000	2,342,000	8,172,000	18,262,000
145. **Quaker** (Quaker Oats Co.)	Foods	8,124,000	6,763,000	17,878,000	18,215,000
146. **Red Lobster** (General Mills)	Restaurants	7,218,000	11,490,000	13,957,000	17,882,000
147. **Viceroy** (BAT Industries)	Cigarettes	11,062,000	10,703,000	17,882,000	17,848,000
148. **Shell** (Shell Oil)	Gas, oil	16,662,000	16,243,000	23,427,000	17,743,000
149. **Dial** (Greyhound Corp.)	Soap	7,941,000	5,696,000	14,124,000	17,694,000
150. **Brim** (General Foods)	Coffee	3,022,000	4,496,000	13,745,000	17,445,000
	Top 150 totals	**$4,618,751,000**	**$5,418,669,000**	**$5,933,574,000**	**$6,464,785,000**

151. **Black & Decker** (Black & Decker)	Tools	4,479,000	6,488,000	9,480,000	17,332,000
152. **Zenith** (Zenith Corp.)	Radios, tv sets	14,916,000	18,295,000	18,748,000	17,319,000
153. **Tide** (Procter & Gamble)	Detergents	15,430,000	16,477,000	17,912,000	17,312,000
154. **Excedrin** (Bristol-Myers)	Medicines	16,252,000	16,097,000	15,959,000	17,297,000
155. **Midas** (IC Industries)	Auto accessories	11,383,000	13,189,000	15,205,000	17,206,000
156. **Minute Maid** (Coca-Cola)	Fruit juices	8,934,000	12,788,000	14,498,000	17,196,000
157. **Duncan Hines** (Procter & Gamble)	Baking mixes	16,473,000	18,177,000	12,642,000	17,116,000
158. **Phillips** (Phillips Petroleum)	Gas, oil	14,268,000	11,201,000	15,032,000	17,040,000
159. **K-Tel** (K-Tel International)	Records, tapes, books	11,489,000	15,656,000	15,386,000	17,024,000
160. **TV Guide** (Triangle)	Magazines	16,055,000	16,380,000	18,889,000	17,110,000

Top 200 Millionaire Brands 1977-1978-1979-1980

BRAND NAME (AND PARENT COMPANY)	CLASSIFICATION	1977	1978	1979	1980
161. **Dr Pepper** (Dr Pepper Co.)	Soft drinks	$ 10,250,000	$ 12,238,000	$ 14,195,000	$ 17,010,000
162. **Johnson** (S. C. Johnson Co.)	Cleaners, laundry preparations	23,921,000	15,455,000	14,309,000	16,986,000
163. **American Dairy** (Amer. Dairy)	Dairy products	14,485,000	12,800,000	15,229,000	16,974,000
164. **Century/21** (Century/21)	Real estate	17,367,000	15,608,000	21,402,000	16,691,000
165. **Pert** (Procter & Gamble)	Hair care	—	—	672,000	16,614,000
166. **Florida Citrus** (Flor. Citrus Comm.)	Fruits	9,852,000	13,971,000	12,798,000	16,503,000
167. **More** (R.J. Reynolds)	Cigarettes	12,518,000	17,303,000	12,178,000	16,449,000
168. **Stouffer's** (Nestle)	Restaurants	3,301,000	4,152,000	9,690,000	16,426,000
169. **Gulf** (Gulf Oil Co.)	Gas, oil	14,307,000	2,075,000	11,375,000	16,229,000
170. **Long John Silver** (Jerrico, Inc.)	Restaurants	5,611,000	6,798,000	12,391,000	16,054,000
171. **Aim** (Lever Bros.)	Toothpaste	13,946,000	13,825,000	15,596,000	16,031,000
172. **Subaru** (Fuji Industries)	Passenger cars	7,467,000	11,305,000	17,271,000	15,914,000
173. **Blue Cross** (Blue Cross/Blue Shield)	Insurance	11,300,000	13,843,000	13,656,000	15,847,000
174. **Chef Boy-Ar-Dee** (Amer. Home Prods.)	Prepared foods	16,550,000	11,947,000	13,322,000	15,721,000
175. **Head & Shoulders** (Procter & Gamble)	Shampoos	12,333,000	10,299,000	13,081,000	15,685,000
176. **Parker Bros.** (General Mills)	Games	6,799,000	8,730,000	10,130,000	15,510,000
177. **Ken-L-Ration** (Quaker Oats)	Pet food	13,521,000	16,065,000	14,488,000	15,198,000
178. **Fiat** (Fiat SPA)	Passenger cars	12,666,000	26,043,000	13,988,000	15,115,000
179. **Oscar Mayer** (Oscar Mayer)	Meats	9,923,000	11,223,000	13,295,000	15,007,000
180. **Secret** (Procter & Gamble)	Deodorant	9,717,000	12,165,000	13,274,000	14,974,000
181. **Prep H** (American Home Products)	Medicine	13,038,000	12,117,000	14,912,000	14,941,000
182. **Swift** (Esmark, Inc.)	Meats	8,273,000	11,091,000	11,729,000	14,887,000
183. **Holiday Inn** (Holiday Inn)	Hotel/motel	8,653,000	10,900,000	15,456,000	14,746,000
184. **Porcelana** (Jeffrey Martin)	Skin cream	—	328,000	5,603,000	14,726,000
185. **Downy** (Procter & Gamble)	Laundry preparation	13,921,000	17,770,000	14,685,000	14,709,000
186. **Walt Disney** (Walt Disney)	Motion pictures	12,777,000	14,874,000	18,310,000	14,671,000
187. **Kleenex** (Kimberly Clark)	Paper products	1,707,000	8,756,000	11,137,000	14,669,000
188. **Timex** (Timex Corp.)	Watches	9,239,000	11,548,000	14,994,000	14,649,000
189. **Doral** (R.J. Reynolds)	Cigarettes	—	—	20,791,000	14,552,000
190. **Bufferin** (Bristol-Myers)	Medicine	12,922,000	14,183,000	14,818,000	14,430,000
191. **Stayfree** (Johnson & Johnson)	Feminine hygiene	11,106,000	12,120,000	12,695,000	14,420,000
192. **Contac** (SmithKline)	Cleanser	15,463,000	16,569,000	17,235,000	14,346,000
193. **Bounce** (Procter & Gamble)	Laundry preparation	12,978,000	24,650,000	14,065,000	14,316,000
194. **Renault** (Renault USA, Inc.)	Passenger cars	3,492,000	4,014,000	5,297,000	14,173,000
195. **United Artists** (Transamerica Corp.)	Motion pictures	5,681,000	11,892,000	20,097,000	14,168,000
196. **Whirlpool** (Whirlpool Corp.)	Appliances	10,683,000	11,394,000	13,717,000	14,025,000
197. **Alberto** (Alberto-Culver)	Hair products	10,991,000	14,118,000	14,764,000	13,922,000
198. **Tab** (Coca-Cola)	Soft drinks	4,286,000	8,660,000	13,799,000	13,856,000
199. **Dexatrim** (Thompson Medical)	Medicine	657,000	1,113,000	4,982,000	13,793,000
200. **Hallmark** (Hallmark)	Greeting cards	8,957,000	5,605,000	13,287,000	13,658,000
	Top 200 totals	**$5,135,570,000**	**$6,008,666,000**	**$6,622,038,000**	**$7,246,826,000**

The expenditures in the eight major national advertising media of the top 200 advertised brands represents about half of all dollars invested in those media. For more detailed information on how each brand spends its ad dollars and for how other brands (those with budgets totalling less than $13.6 million in the eight major media) split their budgets the sources are Leading National Advertisers, Broadcast Advertiser Reports, Media Records, and Radio Expenditure Reports.

Directory of Top 200 Millionaire Brands

Media expenditures in eight major media (magazines, supps, newspapers, network tv, spot tv, network radio, spot radio, outdoor) in 1979 and 1980 — Key media decision makers in companies and their agencies. These brands spend about half of total.

1.

SEARS

Sears, Roebuck and Co.

	media dollars	
	1979	1980
Magazines	$ 12,661,000	$ 19,000,000
Supps	99,000	100,000
Newspapers	303,000,000	330,000,000
Network tv	50,335,000	60,000,000
Spot tv	15,047,000	17,000,000
Network radio	5,434,000	4,000,000
Spot radio	19,000,000	12,000,000
Outdoor	57,000	60,000
Total	**$405,835,000**	**$442,160,000**

Classification: all retail
Marketing/brand management:
Natl. ret. adv. mgr., David G. Slothower, media services mgrs., Bernie Miller (magazines, broadcast); Gerry Byrne (newspapers, supps); dir. of bdcst. John Beebe
Agencies: FC&B, New York
(Women's apparel, accessories, specialties)
Sr. vp-mgmt. supr., James Guthrie
Vp-dir. of media, Madeline Nagel
FC&B, Chicago
(Sporting goods, automotive products)
Sr. vp-mgmt. supr., Will Adams
Sr. vp-dir. of media, Greg Blaine
Ogilvy & Mather, Chicago
(Appliances, home fashions, corporate credit)
Sr. vp-mgmt. supr., Jeffrey Woll
Vp-assoc. media dir., Bill Behrmann
JWT, Chicago
(Home improvements)
Sr. vp-mgmt. supr., Brian Squires
Sr. vp/media dir., Bob Irvine
Stern Walters/Earle Ludgin, Chicago
(Children's apparel, commercial sales)
Sr. vp-mgmt. rep., Maryanne Friend
Sr. vp-media dir., Robert Walters
McCann-Erickson, Chicago
(Men's apparel)
Vp-mgmt. rep. Donald D. Effler
Vp-media dir., Mike White
Vince Cullers Advertising, Chicago
(Black agency of record)
Pres. Vince Cullers
N.W. Ayer, Inc., Chicago
(Business Machine Stores)
Sr. vp-mgmt. supr., Robert Mickels

2.

K MART

K Mart Corp.

	media dollars	
	1979	1980
Magazines	$ 5,164,000	$ 11,500,000
Supps	—	—
Newspapers	207,000,000	230,000,000
Network tv	8,089,000	19,500,000
Spot tv	16,282,000	31,000,000
Network radio	1,800,000	3,000,000
Spot radio	6,000,000	9,000,000
Outdoor	30,000	50,000
Total	**$244,365,000**	**$304,050,000**

Classification: all retail
Marketing/brand management:
Dir. adv. & sls. prom., R. R. Dejaeghere
Dir. of adv. & mktg., Edward J. Kreitz
Sen. vp-retail operations, Pete Vetowich
Agency: Ross Roy, Detroit
Dir. creative adv., R. Mazade
Sr. vp-mktg., H. E. Rumble
Sr. vp-mktg. services, Gerald N. Moody
Vp-grp. media dir., Al Duz
Vp-grp. media dir.-bdcst. buying, Patricia Cuda

3.

PENNEY'S

J. C. Penney

	media dollars	
	1979	1980
Magazines	$ 7,459,000	$ 6,000,000
Supps	12,000	20,000
Newspapers	198,000,000	200,000,000
Network tv	21,366,000	20,000,000
Spot tv	15,141,000	17,000,000
Network radio	867,000	4,000,000
Spot radio	8,000,000	11,000,000
Outdoor	134,000	150,000
Total	**$250,979,000**	**$258,170,000**

Classification: all retail
Marketing/brand management:
Vp-dir. of corp. mktg., Howard M. Evans
Mgr. media services, James F. Boynton
Mgr. of mktg. comm., Lou Bremer
National media planner, Dave Wood
Proj. mgr., Nada Williams
Adv. mgr., John T. Lucas
Agency: McCaffrey & McCall, New York
Sr. vp-grp. acct. mgr., William J. Vieser
Acct. exec., Jim L'Heureux
Sr. vp-media dir., Harris Lefkon
Sr. vp-dir. net. neg., Joseph Sutton
Net. neg., John C. Giebel

4.

FORD cars & trucks

Ford Motor

	media dollars	
	1979	1980
Magazines	$ 23,663,000	$ 27,721,000
Supps	11,000	—
Newspapers	24,558,000	16,901,000
Network tv	74,110,000	91,821,000
Spot tv	39,246,000	38,658,000
Network radio	1,392,000	2,263,000
Spot radio	8,686,000	16,466,000
Outdoor	3,598,000	3,933,000
Total	**$175,264,000**	**$197,763,000**

Classifications: passenger cars (LNA T-110); trucks (LNA T-120)
Marketing/brand management:
Ford Division
General mktg. mgr., L. R. Miskowski
Adv. mgr., D. T. McClure
Car adv. mgr., R. J. Gillooly
Truck adv. mgr., R. O. Davis
Dealer adv. mgr., J. H. Baird
Ford Tractor Operations
Mktg. mgr., John Churchman
Adv./sales prom., A. Pridgeon
Agencies: JWT, Dearborn
(Ford Division)
Exec. vp., J. W. O'Donnell
Sr. vp-media, E. J. McCarthy
Vp dir. (car), H. Spokes
Dir. (truck), R. Dreyfuss
Vp broadcast supr., D. Riordan
Meldrum & Fewsmith, Southfield, Mich.
(Tractors)
Acct. grp. supr., Owen R. Leffler
Acct. supr., J. C. Bryan
Acct. exec., M. A. Shencopp
Media dir., George Hay
Media buyer (bdcst.) Ms. Lynn Lekander

5.

WARDS

Mobil Corp.

	media dollars	
	1979	1980
Magazines	$ 318,000	—
Supps	—	—
Newspapers	123,000,000	$132,500,000
Network tv	213,000	—
Spot tv	29,214,000	26,000,000
Network radio	—	—
Spot radio	7,000,000	8,000,000
Outdoor	76,000	100,000
Total	**$159,821,000**	**$166,600,000**

Classification: all retail
Marketing/brand management:
Asst. natl. ret. mdge mgt., John D. Flakne
Retail adv. mgr., operations, Eugene W. Schaefer
Media dir., Carol Brewster
Natl. ret. sls. prom. & adv. mgr., Alfred H. Lemke
Agency: Lee King, Chicago
Mgmt. supr., John Tarini
Media Service: CPM, Inc., Chicago
Pres., Norman M. Goldring
Exec. vp, Michael Willner
Vp, L. Roger Casty
Dir. broadcast buying, Adrienne Alm
Media Services: Media Bureau, Int.
Pres., Richard Pickett
Vp, Norma Wren

6.

WOOLCO

F. W. Woolworth

	media dollars	
	1979	1980
Magazines	$ 40,000	$ 2,000,000
Supps	—	—
Newspapers	118,000,000	124,000,000
Network tv	—	4,000,000
Spot tv	6,846,000	11,000,000
Network radio	—	1,000,000
Spot radio	5,000,000	7,000,000
Outdoor	2,000,000	2,000,000
Total	**$131,886,000**	**$151,000,000**

Classification: all retail
Marketing/brand management:
Vp-merchandise, J. M. Evans
Vp-sales & adv., E. W. Kauffman
Dir. adv., George A. Inman
Mgr. bdcst. adv., E. A. Maguire
Agency: Sawdon & Bess, New York
Pres., Jerome Bess
Exec. vp-mgmt. supr., John Paul Jones
Vp-acct. supr., John F. Hilz
Media dir., John Prendergast

7.

CHEVROLET cars & trucks

General Motors

	media dollars	
	1979	1980
Magazines	$ 21,805,000	$ 15,061,000
Supps	1,191,000	1,506,000
Newspapers	22,874,000	9,996,000
Network tv	50,431,000	53,362,000
Spot tv	45,405,000	31,107,000
Network radio	1,189,000	372,000
Spot radio	13,941,000	19,026,000
Outdoor	4,287,000	8,311,000
Total	**$161,123,000**	**$138,741,000**

Classifications: passenger cars (LNA T-110); trucks (LNA T-120)
Marketing/brand management:
Dir., nat'l. adv., Carl O. Uren
Mgr., passenger car adv., T. R. Chick
Mgr., truck & wagon adv., H. J. Cordes
Dir. mktg., E. P. Feely, Jr.
Agency: Campbell-Ewald, Detroit
Exec. vp-acct. dir., William J. Tausch
Sr. vp-assoc. acct. dir., Dick O'Neil
Exec. vp-media dir., Thomas J. Glynn
Sr. vp-assoc. media dir., Louis Schultz

8.

AT&T/BELL

	media dollars	
	1979	1980
Magazines	$22,362,000	$ 28,396,000
Supps	391,000	608,000
Newspapers	1,225,000	2,336,000
Network tv	51,286,000	53,471,000
Spot tv	10,573,000	44,844,000
Network radio	7,079,000	5,937,000
Spot radio	70,000	140,000
Outdoor	64,000	783,000
Total	**$93,050,000**	**$136,515,000**

Classifications: communications (LNA B-140); magazines (Yellow Pages) (LNA B-420)
Marketing/brand management:
Asst. vp-adv., J. A. Howland
Adv. dirs., D. E. Hutchins (residence sales; Yellow Pages); W. Weihe (business)
Adv. mgrs., Jim Cline (Yellow Pages); Kent Planck (bus. mkt.); Ed Swartz (residence mkt.); Tom Ruzicka (graphic design & corp. ident); Dick Draper (corp); Bill Horton (exhibits).
Agencies: N. W. Ayer, New York
(Corporate/informative)
Exec. vp., Tom Maxeg
Acct. supr., Lamar Lemonte
Sr. vp-media dir., Marcella Rosen
Exec. vp., Joe Dodson (long lines)
Vp. acct. super., John Nichols (bus. sales); Joe Del Aquila (res. sales)
Vp-acct. suprs., Fred McClafferty (res. long lines), Jack Quigley (long lines)
Cunningham & Walsh, New York
(Yellow Pages)
Sr. vp-dir. media & mktg. services, Frank McDonald
Sr. vp-mgmt. supr., Nathaniel Allan
Acct. supr., Tom Kirmayer

9.

McDONALD's

McDonald's Corp.

	media dollars	
	1979	1980
Magazines	$ 1,749,000	$ 2,378,000
Supps	—	—
Newspapers	(no data)	(no data)
Network tv	62,456,000	53,588,000
Spot tv	75,334,000	70,716,000
Network radio	—	42,000
Spot radio	647,000	953,000
Outdoor	2,383,000	3,185,000
Total	**$142,569,000**	**$130,862,000**

Classification: restaurants (LNA G-330)
Marketing/brand management:
Exec. vp of mktg., Paul Schrage
Asst. vp-adv. & prom., Roy Bergold
Asst. vo-field mktg., Dick Starmann
Dir. of mktg. devel., Stan Nicpon
Media supr., Kathy Kalber Kinsella
Vp-dir. mktg., Ray Caruso
Agency: Needham, Harper & Steers, Chicago
Vp-assoc. media dir., David Drake
Media supr., Phil Morrow
Vp-network negotiator, Wes Dubin

10.

TOYOTA cars and trucks

Toyota Motor

	media dollars	
	1979	1980
Magazines	$ 9,817,000	$ 7,014,000
Supps	63,000	214,000
Newspapers	8,487,000	6,793,000
Network tv	21,090,000	22,945,000
Spot tv	25,539,000	49,259,000
Network radio	658,000	—
Spot radio	—	3,587,000
Outdoor	1,549,000	1,895,000
Total	**$67,203,000**	**$91,707,000**

Classifications: passenger cars (LNA T-110); trucks (LNA T-120)
Marketing/brand management:
Corp. mktg. mgr., Alvin E. Hagen

Adv. natl. mgr., James E. Press
Adv. proj. mgr., E. P. Broussard
Agency: DFS, New York
Mgmt. reps.: Stuart Upson (N.Y.), Norman Lauchner (L.A.), Jim Lindsey (L.A.)
Sr. vp media dir., Allen Banks

11.
KELLOGG'S products
Kellogg Co.

	media dollars 1979	media dollars 1980
Magazines	$ 2,726,000	$ 4,323,000
Supps	435,000	7,000
Newspapers	4,011,000	3,886,000
Network TV	53,198,000	57,826,000
Spot tv	18,478,000	16,902,000
Network radio	—	—
Spot radio	670,000	2,484,000
Outdoor	10,000	—
Total	**$79,528,000**	**$85,428,000**

Classifications: cereals (LNA F-122) bakery goods (LNA F-160)
Marketing/brand management:
Sr. vp-mktg., J. R. Aubuchon
Vp. grp. prod. mgr., R. L. Myers
Dir.-mktg. services, W. H. Swain
Mgr. print media, C. A. Clark
Agency: Leo Burnett, Chicago
Mgmt. dir., Bill Lynch
Acct. supers., Charles Marien, Jim Jenness, James Drobnyk, Melinda Sherman
Assoc. media dir., Dick Coons

12.
PURINA pet food
Ralston Purina

	media dollars 1979	media dollars 1980
Magazines	$ 8,026,000	$ 9,346,000
Supps	483,000	957,000
Newspapers	1,244,000	1,468,000
Network tv	56,185,000	59,013,000
Spot tv	7,914,000	7,808,000
Network radio	308,000	—
Spot radio	2,730,000	191,000
Outdoor	—	41,000
Total	**$76,890,000**	**$78,824,000**

Classification: pet supplies (LNA G-530)
Marketing/brand management:
Vp-dir. of adv. & mktg. services, William M. Claggett
Div. vp.-pet foods mktg., Blair Gensamer
Media commun. dir., F. Lee Zingale
Media dirs.: Mary Howard, Don Martin
Agencies: Wells, Rich, Greene
Sr. vp-mgmt. supr., David Bulleit
Sr. vp. corp. med. dir., Bob Geis
Vp. plan. serv. dir., Steve Ziglar,
Plan. Grp. head, Pat Casa
Della Femina, Travisano & Partners
Mgmt. rep., Jerry Della Femina
Sr. vp-media dir., Herb Maneloveg
Mgmt. rep. (West Coast), James Travis
Media dir. (West Coast), Ronnie Greenfield
Drossman, Yustein, Clowes/Della Femina (Meow Mix)
Mgmt. rep., Rusty Clowes
N. W. Ayer, New York
Sr. vp-mgmt. supr., George Lemmond
Media dir., Marcella Rosen
McDonald & Little, Atlanta
Sr. vp-mgmt. supr., Alf Nucifora
Med. dir., Spencer Hapoiena
Gardner, St. Louis
Pres., C. Kelly O'Neill
Sr. vp-acct. mgmt., Donald Weakley
Mgmt. supr.: Tom Hizar
Advanswers Media/Programing (St. Louis, New York, Los Angeles
(Sub. Gardner Advtg.)
Pres., Don Stork
Exec. vp., Jack Shubert
Pres. network subsidiary, Paul Schulman
Avrett, Free & Fischer, Inc.
Sr. vp. Mgmt. supr., Ron Thomas
Sr. vp. Media dir., Bruce Hoenig
MCA Advertising, New York
Pres.-mgmt. Supr., Wm. Dunlap
Media dir., Robert Jones
Tatham Laird & Kudner, Chicago
Sr. Partner, mgmt. supr., Pete Petray
Media dir., Len Materna
Don Tennant Co., Chicago
Exec. vp, dir. client serv., Thomas Prchal
Media dir., Jim Gustafson

13.
KRAFT
Dart & Kraft Inc.

	media dollars 1979	media dollars 1980
Magazines	$19,536,000	$22,123,000
Supps	258,000	1,180,000
Newspapers	3,366,000	4,160,000
Network tv	36,214,000	34,696,000
Spot tv	11,661,000	11,036,000
Network radio	912,000	1,046,000
Spot radio	1,533,000	2,899,000
Outdoor	940,000	645,000
Total	**$74,470,000**	**$77,785,000**

Classifications: cooking products (LNA F-110); dairy products (LNA F-130); prepared foods (LNA F-120); confectionery (LNA F-210)
Marketing/brand management:
Gen. adv. mgr., James R. Blocki
Prod. adv. services mgr., R. K. Powell
Group brand mgrs.: E. H. Hale (jellies); J. L. MacDonald (pourables); P. Buranich, J. S. Camp, R. Verner, H. E. Jolly (cheese); J. B. Killinger (confections); J. G. Powell (dinners BBQ); J. S. Craig (viscous); H. Roberts (margarine citrus); L. A. Clark, R. W. Shaw (new products)
Agencies, FC&B, Chicago
Grp. mgmt. supr., D. L. Belzer
Mgmt. supr., P. B. Llewellyn
Acct. suprs. (dinners), D. R. Schreiber, (BBQ sauce), E. J. Rosenkranz
Acct. exec. (teen & home econ.), D. Balabanos
Grp. media dir., Ralph Katz
Media supr., Katie Donoval
Needham, Harper & Steers, Chicago
Sr. vp, Mgmt. rep., Jack W. Copher
Vp-acct. dir., Kathie McKirdy
Acct. sup., J. R. Vogrin
Acct. sup., T. M. Hazlett
Acct. sup., V. K. Nelson
Grp. deputy dir., W. F. Heimann
Assoc. media dir., Robert Garrison
Acct. Coord., Joanne Grabo
JWT, Chicago
Sr. vp, R. L. McCullough
Mgmt. suprs.: R. Hielscher (cheese); G. Moss (viscous dressings); M. Peroff (pourable dressings); F. Stevens (new products); Cheryl Johnston (tv specials); J. Anastos (food service/military)
Acct. suprs., K. Prior, M. Kennan, J. Ahtes, T. Denise, J. Yost, G. Castle, B. Soloff, Marilyn Keenan
Grp. media dir., P. Gerber
Assoc. media dir., Nadine Martens
Proctor & Gardner, Chicago
Acct. supr., Rolfe Kolconay
Media dir., Anthony Moore
N. W. Ayer, New York
Exec. vp-mgmt. supr., Stuart Minton, Jr.
Dir. media services, George Burrows
Acct. mgmt., Joe Harte

14.
MILLER beer
Philip Morris

	media dollars 1979	media dollars 1980
Magazines	$ 247,000	$ 343,000
Supps	—	—
Newspapers	49,000	98,000
Network tv	50,253,000	56,873,000
Spot tv	6,875,000	12,148,000
Network radio	—	—
Spot radio	1,746,000	6,674,000
Outdoor	67,000	98,000
Total	**$59,237,000**	**$76,234,000**

July 1, 1981. There are 229,808,016 Americans.

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SIMMONS
MARKET RESEARCH BUREAU INC.
The mirror of the nation.

219 EAST 42 STREET/NEW YORK, NEW YORK 10017/(212) 867-1414

Classification: beer (LNA F-310)
Marketing/brand management:
Exec. vp., Lauren S. Williams
Dir. brand mgmt., William W. Catlin
Grp. prod. dirs.: John Garner (Highlife, new prod.), Robert Toledo (Lite),
Brand mgrs.: Douglas E. Rogers (Highlife), William H. Barrett (Lite)
Agency: Backer & Spielvogel, New York
Account services, Bob Holmen
Media services, Steve Leff
Sr. vps: Jeff Palmer, Randy Lindell
Med. dir., Jay Schoenfeld

15.

GE

General Electric

	media dollars	
	1979	1980
Magazines	$20,010,000	$16,438,000
Supps	1,992,000	2,172,000
Newspapers	5,296,000	7,545,000
Network tv	23,923,000	32,987,000
Spot tv	9,777,000	8,396,000
Network radio	842,000	2,765,000
Spot radio	835,000	1,410,000
Outdoor	26,000	183,000
Total	**$62,701,000**	**$71,896,000**

Classifications: major appliances (LNA H-210); other appliances (LNA H-220); radios, tv sets (LNA H-310)
Marketing/brand management:
Staff executive, Leonard Vickers
Mgr. corp. adv., Karl L. Koss
Consumer products & services sector
Mgr. mktg. programs, Richard A. Costello
Major appliances
Mgr. nat. adv., Victor H. Alcott
Mgr. prod. adv., Herbert M. Metzler
Mgr. prod. adv., Ronald N. Graham
Central Air Cond.
Mgr. ad. & sls. plan., Leo Brown
Mgr. ret. adv. & merch., Gaylynn Garrett
Housewares & audio division
Housewares mgr., adv. SP&PR, Vince Novak
Audio mgr. adv. & SP., Norman R. Huey
TV business division
Mgr. mktg. communications, Peter J. Gariti
GE Credit Corp.
Mgr. mktg. communications, Barton D. Ladd
Lamp products division
Mgr. adv. & SP, William D. Rayer
BBDO, New York
Med. supr., Les Margulis (corporate,

consumer products service sector, tv, housewares & audio)
Med. supr., Steve Kurtzer (major appliances, GECC, lamp products, industrial)
Med. planners, Tory George, Carol Donahue, Nancy Jenks, Aaron Belson, Barbara Helman
Agencies: Y&R, New York
(central air conditioning)
Grp. dir., Bill Thompson
Mgmt. super., Ricardo Cavillo
Acct. exec., Phil Moloney
Sr. vp-med. grp. super., Gary Pranzo
Med. super., Barbara Towey
Sr. planner, Paul Zappert

16.
SALEM cigarettes
R. J. Reynolds

	media dollars	
	1979	1980
Magazines	$18,094,000	$22,714,000
Supps	7,354,000	4,580,000
Newspapers	16,661,000	29,853,000
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	6,084,000	9,684,000
Total	**$48,193,000**	**$66,831,000**

Classification: tobacco (LNA G-110)
Marketing/brand management:
Dir. mktg. services, Marty Orlowsky
Dir. media, Dan Pearson
Group planning mgr., Tom McCabe
Brand planning mgr., Betty Garner
Brand mgr., K. Neher
Agency: William Esty, New York
Grp. mgmt. super., L. M. Wassong
Mgmt. super., J. E. Neal

17.
DATSUN cars and trucks
Nissan Motor

	media dollars	
	1979	1980
Magazines	$ 8,066,000	$ 7,405,000
Supps	88,000	440,000
Newspapers	8,391,000	6,862,000
Network tv	20,091,000	18,150,000
Spot tv	21,865,000	25,753,000
Network radio	—	—
Spot radio	5,697,000	5,850,000
Outdoor	1,279,000	1,251,000
Total	**$65,477,000**	**$65,711,000**

Classifications: passenger cars (LNA T-110); trucks (LNA T-120)
Marketing/brand management:
Vp-mktg. services, Bob Kent
Dir. adv., Joe Opre
Media planning mgr., Clay Briggs
Agency: William Esty, New York
Vp-mgmt. supr., George Beech (NY)
Acct. supr., Bob Vander Kamp (LA)
Media dirs., Tom Hill (NY), Martin Foody (LA)

18.
VANTAGE cigarettes
R. J. Reynolds

	media dollars	
	1979	1980
Magazines	$22,126,000	$22,965,000
Supps	5,512,000	7,143,000
Newspapers	16,522,000	27,196,000
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	2,016,000	2,385,000
Total	**$46,176,000**	**$59,689,000**

Classification: tobacco (LNA G-110)
Marketing/brand management:
Dir. mktg. services, Marty Orlowsky
Dir. media, Dan Pearson
Group planning mgr., Tom McCabe
Brand planning mgr., Betty Garner
Brand mgr., G. McKenna
Agency: Leber Katz Partners, New York
Sr. mgmt. supr., Jerome L. Davidow
Mgmt. supr., Robert Hirsch

19.
CHRYSLER cars
Chrysler

	media dollars	
	1979	1980
Magazines	$ 8,291,000	$ 6,219,000
Supps	26,000	2,007,000
Newspapers	357,000	10,158,000
Network tv	29,585,000	26,751,000
Spot tv	4,570,000	7,356,000
Network radio	978,000	140,000
Spot radio	3,362,000	4,293,000
Outdoor	1,000	111,000
Total	**$47,170,000**	**$57,035,000**

Classification: passenger cars (LNA T-110)
Marketing/brand management:
Ad. mgr., Doyle Lott
Mgr. mkt. res & analysis, Jeff Elpern
Agency: Kenyon & Eckhardt, Detroit
Sr. vp-mgmt. supr., Bruce McRitchie
Acct. supr., Mike Howe
Media dir., Philip D. Matz

20.
KENT cigarettes
Loews

	media dollars	
	1979	1980
Magazines	$15,650,000	$15,374,000
Supps	8,083,000	5,792,000
Newspapers	21,798,000	26,498,000
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	9,764,000	8,399,000
Total	**$55,205,000**	**$56,063,000**

Classification: tobacco (LNA G-110)
Marketing/brand management:
Exec. vp-mktg., Robert Ave
Vp-adv. & brand mgmt., T. H. Mau
Grp. brand dir. (Kent, Kent III), George Telford
Br. mgr, John Marx
Media dir., Bill Sands
Mgr. OOH media, Lucy Puccio
Mgr., In-home, Stephen Molloy
Agency: FC&B, New York
Grp. mgmt. supr., K. R. Patton
Acct. supr., Paul Iffland
Acct. exec. (Kent & Max), Eileen Malone
Acct. exec., Kent III, Jill Seligson
Sr. vp-dir. of media & adm. services, Madeline Nagel
Media supr., Mary Fox
Planner, Madeline Baker

21.
MERIT
Philip Morris

	media dollars	
	1979	1980
Magazines	$15,237,000	$14,120,000
Supps	5,221,000	5,372,000
Newspapers	26,886,000	29,141,000
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	4,433,000	7,007,000
Total	**$51,777,000**	**$55,640,000**

Classification: tobacco (LNA G-110)
Marketing/brand management:
Vp-media, James L. Thompson, Jr.
Vp-brand & promotion, Robert Fitzmaurice
Brand mgr., Richard L. Stirlen
Agency: Leo Burnett, Chicago
Mgmt. dir., Bill Engelbrecht
Acct. supr., Peter Metz
Assoc. media dir., Bob Houghtlin

22.
PEPSI-COLA
PepsiCo

	media dollars 1979	media dollars 1980
Magazines	$ 215,000	$ 30,000
Supps	—	—
Newspapers	938,000	1,050,000
Network tv	18,561,000	20,619,000
Spot tv	33,329,000	26,740,000
Network radio	—	—
Spot radio	3,695,000	5,950,000
Outdoor	448,000	612,000
Totals	**$57,186,000**	**$55,001,000**

Classification: soft drinks (LNA F-220)
Marketing/brand management:
Vp-mktg., Larry Higby
Media dir., Henry V. Hayes
Natl. media mgr., Ron Mednick
Mktg. mgrs.: Rick Routhier, Roy Stewart
Agency: BBDO, New York
Vp-mgmt. suprs., Jack Kraushaar, Ken Rogers
Vp-acct. suprs., Joe McCarthy, Allan Tractenberg
Vp. assoc. med. dir., Mike Drake
Vp. asst. med. dir., Ivan Becker

23.
KODAK cameras and film
Eastman Kodak

	media dollars 1979	media dollars 1980
Magazines	$14,238,000	$10,864,000
Supps	64,000	214,000
Newspapers	1,975,000	3,180,000
Network tv	34,066,000	34,762,000
Spot tv	3,413,000	3,226,000
Network radio	1,922,000	1,559,000
Spot radio	3,636,000	283,000
Outdoor	776,000	312,000
Total	**$60,090,000**	**$54,400,000**

Classifications: cameras (LNA G-230); office machines (LNA B-310)
Marketing/brand management:
Vp gen. mgr., mktg. dir., J. Phillip Samper
Dir. adv., William Pedersen
Vp. dir. mktg., comm., Jack Powers
Dir. media, Roger Morrison
Agency: JWT, New York
Exec. vp-grp. acct. dir. (Worldwide), William Thompson
Vp-grp. acct. dir. (Domestic), John Wells
Vp-grp. media dir., John Sisk
Vp-assoc. media dir., George Rosenkranc
Young & Rubicam, New York
Instant photography
Vp-mgmt. supr., Ricardo Calvillo
Acct. super., Paul Abry
Acct. execs.: Sarah Adams, Tom Wardrop
St. vp.-med. grp. super., George Sharpe
Media supr., William Colihan

24.
BUDWEISER beer
Anheuser-Busch

	media dollars 1979	media dollars 1980
Magazines	$ 1,111,000	$ 1,000,000
Supps	—	—
Newspapers	214,000	258,000
Network tv	22,531,000	22,481,000
Spot tv	3,621,000	6,310,000
Network radio	2,043,000	1,868,000
Spot radio	6,835,000	16,370,000
Outdoor	163,000	745,000
Total	**$36,518,000**	**$49,032,000**

Classification: beer (LNA-F-310)
Marketing/brand management:
Vp-mktg., Michael J. Roarty
Natl. media coord., Charles B. Fruit
Vp-brand management, Jack MacDonough
Med. dir., Charles B. Fruit
Grp. mktg. mgr., Tom Sharbaugh
Product mgr., Mark Pirrung
Agency: D'Arcy-MacManus & Masius, St. Louis
Vp-acct. supr., Tim Arnold
Acct. exec.: Jack Hanzlovic
Vp-group media dir., Steve Phelps
Ass. med. dir., Gary Titterington

25.
MARLBORO cigarettes
Philip Morris

	media dollars 1979	media dollars 1980
Magazines	$19,123,000	$19,082,000
Supps	2,926,000	2,358,000
Newspapers	13,607,000	17,328,000
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	9,732,000	9,910,000
Total	**$45,388,000**	**$48,678,000**

Classification: tobacco (LNA G-110)

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Marketing/brand management:
Vp-brand & promotion, Robert Fitzmaurice
Brand mgr., Bob Roper
Vp-media, James L. Thompson Jr.
Agency: Leo Burnett, Chicago
Sr. vp-mgmt., supr., Bill Engelbrecht
Acct. super., Peter Volz
Vp-assoc. media dir., Bob Houghtlin

26.
WINSTON cigarettes
R. J. Reynolds

	media dollars 1979	1980
Magazines	$25,725,000	$23,728,000
Supps	7,898,000	—
Newspapers	17,581,000	11,498,000
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	8,026,000	13,118,000
Total	**$59,230,000**	**$48,344,000**

Classification: tobacco (LNA G-110)
Marketing/brand management:
Dir. mktg. services, Marty Orlowsky
Dir. media, Dan Pearson
Group planning mgr., Bernie Bauguess
Brand Mgr., J. Hersberger
Agency: William Esty, New York
Grp. mgmt. supr., L. M. Wassong
Mgmt. supr., J. E. Neal

27.
CLAIROL hair products
Bristol-Myers

	media dollars 1979	1980
Magazines	$11,182,000	$10,692,000
Supps	797,000	1,594,000
Newspapers	1,986,000	1,920,000
Network tv	32,732,000	27,929,000
Spot tv	13,040,000	5,340,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	12,000
Total	**$59,737,000**	**$47,487,000**

Classification: hair products (LNA D-140); bath toiletries (LNA D-130)
Marketing/brand management:
Vp marketing, Dave Ruckert
Vp-sales, Don L. Harkness
Group product mgrs.: Mike Lorelli (hair care), Rich Davidian (hair color), John Doran (new products)
Agencies: Ogilvy & Mather, New York
Hair care/new products
Sr. vp-mgmt. supr., John Blaney
Vp-mgmt. supr., Shelly Lazarus
FC&B, New York
Hair care/hair coloring
Sr. vp-group mgmt. supr., Alan Klein
Vp-mgmt. supr., Jor Froschl
Vp-assoc. media dir., Mark Fox
Appliances
Sr. vp-group mgmt. supr., Jeff Fine
Vp-mgmt. supr., Charles Evans, Jr.
Vp-media dir., Madeline Nagel
Vp-assoc. media dir., Maxine Cohen
Media supr., Madelyn Baker
Vp-acct. supr., Dany Khosrovani
Acct. supr., Stephen Smith
Doyle Dane Bernbach, New York
Group sr. vp, John H. Leonard
Sr. vp-mgmt. supr., Milton Harkrader
Vp-acct. suprs.: Stephen Kutler, Barbara Monte
Acct. execs.: Phyllis Califano, Barbara Liedeker, Betsy Means, Pat Stockhausen
Asst. acct. execs.: Alexa Ratway, Robert Jeffrey
Admin. Asst., Marie Henderson
Media planning dir., Conant Sawyer
Asst. media planning dir., Ellen Conlin, Diana Bogkin
Media planners: Pat Engel, Joan Gugliotta
Wyse, New York
Clairesse, new products
Vp-media dir., Nat Gayster
Acct. supr., Gary Boens
Acct. exec., Robert Grossman
Media planners: Mary Persaii, Lynn Kost

28.
UNITED
UAL

	media dollars 1979	1980
Magazines	$ 2,604,000	$ 2,014,000
Supps	35,000	1,000
Newspapers	13,248,000	16,062,000
Network tv	6,898,000	8,491,000
Spot tv	8,743,000	12,390,000
Network radio	—	—
Spot radio	5,321,000	8,149,000
Outdoor	159,000	270,000
Total	**$37,008,000**	**$47,377,000**

Classifications: passenger travel (LNA T-410); freight (LNA B-610)
Marketing/brand management:
Vp-marketing, John Zeeman

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Division acct., suprs.: John Goad, Jim Dotter

29.
VOLKSWAGEN cars
Volkswagenwerk A. G.

	media dollars	
	1979	1980
Magazines	$ 7,133,000	$11,578,000
Supps	—	69,000
Newspapers	1,658,000	2,201,000
Network tv	16,973,000	18,635,000
Spot tv	4,823,000	12,838,000
Network radio	—	—
Spot radio	42,000	50,000
Outdoor	286,000	692,000
Total	**$30,915,000**	**$46,063,000**

Classification: passenger cars (LNA T-110)
Marketing/brand management:
Mgr. Volkswagen mktg., John Slaven
Adv. mgr., Gary Fisher
Adv. prom. specialist, George Pizzo
Agencies: Doyle Dane Bernbach, New York
Grp. sr. vp, Robert Rees
Mgmt. supr., Robert Dunn
Acct. supr., Al Steiner
Media planning dir., John Pansuti
Assoc. media planning dir., Robert Gorby

30.
NOW cigarettes
R. J. Reynolds

	media dollars	
	1979	1980
Magazines	$ 9,064,000	$15,251,000
Supps	316,000	4,974,000
Newspapers	677,000	19,448,000
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	—	5,905,000
Total	**$10,057,000**	**$45,578,000**

Classification: Tobacco (LNA G-110)
Marketing/brand management:
Dir. mktg. serv., Marty Orlowsky
Dir. media, Dan Pearson
Brand mgr., John Goss
Brand prom. mgr., Bill Murray
Agency: Leber, Katz & Partners, New York
Acct. grp. super., Jeff Palmer

31.
MERCURY cars
Ford Motor

	media dollars	
	1979	1980
Magazines	$ 4,141,000	$ 5,840,000
Supps	—	31,000
Newspapers	1,829,000	885,000
Network tv	12,699,000	22,431,000
Spot tv	11,494,000	13,449,000
Network radio	—	1,966,000
Spot radio	707,000	647,000
Outdoor	—	285,000
Total	**$30,870,000**	**$45,534,000**

Classification: passenger cars (LNA T-110)
Marketing/brand management:
Gen. mktg. mgr., Robert L. Rewey
Adv. mgr., John B. Vanderzee
Agency: Young & Rubicam, Detroit
Sr. vp-mgt. supr., John Sanders
Vp-media dir., Ken Poole

32.
MAXWELL HOUSE coffee
General Foods

	media dollars	
	1979	1980
Magazines	$ 2,272,000	$ 795,000
Supps	2,649,000	1,590,000
Newspapers	3,423,000	2,968,000
Network tv	16,916,000	20,156,000
Spot tv	17,595,000	13,379,000
Network radio	3,356,000	3,380,000
Spot radio	4,800,000	2,800,000
Outdoor	—	22,000
Total	**$51,011,000**	**$45,090,000**

Classification: food beverages (LNA F-170)
Marketing/brand management:
Category mgr., Bruce Braimen
Dir. media serv., David Braun
Assoc. media dir., P. E. Kane
Agency: Ogilvy & Mather, New York
Sr. vp-mgmt. supr., Stephen Humphrey
Sr. vp-assoc. media dir., Tony Nacinovich
Asst. media dir., Ray Simko
media planner, Mark Belton

33.
BURGER KING restaurants
Pillsbury

	media dollars	
	1979	1980
Magazines	$ 77,000	$ 80,000
Supps	—	—
Newspapers	(no data)	51,000
Network tv	21,403,000	25,273,000
Spot tv	22,202,000	17,651,000
Network radio	—	—
Spot radio	899,000	1,669,000
Outdoor	528,000	351,000
Total	**$45,109,000**	**$45,075,000**

Classification: restaurants (LNA G-330)
Marketing/brand management:
Exec. vp-mktg., Peter Schweitzer
Vp. adv./prom., Kyle Craig
Vp.-mkt. planning, David Britain
Vp.-mkt. research, Jose Alberni
Vp-field mkt., Jerry Townley
Agencies: JWT, New York
Vp-media, Buck Buchanan
Mgmt. supr., Harry Clark
Grp. media dir., John Gray
Assoc. media dirs.: Amelia Grinstead, Dave Murphy
Planners: Emily Troy, Jill Lipton
Assoc. media dir.-net. neg., Arnold Chase
Negotiator, Nancy Price
Leo Burnett, Chicago
(Steak & Ale restaurants)
Vp.-acct. super., John Miller
Acct. exect., Neil Naroff
Media, Sally Hunter

34.
COCA-COLA soft drink
Coca-Cola

	media dollars	
	1979	1980
Magazines	$ 1,038,000	$ 927,000
Supps	—	—
Newspapers	857,000	1,304,000
Network tv	19,073,000	16,461,000
Spot tv	19,264,000	18,235,000
Network radio	—	—
Spot radio	3,599,000	5,611,000
Outdoor	2,533,000	2,450,000
Total	**$46,364,000**	**$44,988,000**

Classification: soft drinks (LNA F-220)
Marketing/brand management:
Vp-mktg. serv., John J. Gillin
Vp-mgr. adv. serv., William Sharp
Dir., media services, Albert Davis

Agency: McCann-Erickson, New York
Vice-chairman, Charles Hamm
Sr. vp-mgmt. rep., Jack Miller
Vp-mgmt. supr., Peter Hamilton
Vp-assoc. dir. med. plan, Stacey Lippmann

35.
ANACIN analgesic
American Home Products

	media dollars 1979	1980
Magazines	$ 1,296,000	$ 1,655,000
Supps	138,000	—
Newspapers	362,000	—
Network tv	28,101,000	35,939,000
Spot tv	7,831,000	4,698,000
Network radio	1,873,000	1,176,000
Spot radio	70,000	45,000
Outdoor	—	—
Total	**$39,671,000**	**$43,513,000**

Classification: medicines and proprietary remedies (LNA D-210)
Marketing/brand management:
Grp. mgr., Dick Howland
Sr. prod. mgr., John Casey
Pr. mgr., Dorothy McKenna
Agency: John F. Murray (In-house)
Mgmt. supr., Bill Schenkel
Acct. supr., Will Waldron

36.
DODGE cars and trucks
Chrysler

	media dollars 1979	1980
Magazines	$ 4,251,000	$ 5,628,000
Supps	76,000	475,000
Newspapers	5,895,000	—
Network tv	28,469,000	22,790,000
Spot tv	20,069,000	12,978,000
Network radio	938,000	113,000
Spot radio	1,190,000	1,018,000
Outdoor	1,482,000	122,000
Total	**$62,640,000**	**$43,124,000**

Classifications: passenger cars (LNA T-110); trucks (LNA T-120)
Marketing/brand management:
(cars and trucks)
Adv. dir., Doyle Lott
Agency: K&E, Birmingham, MI
Chm., John J. Morrissey
Sr. vp, William Oswald
Sr. vp-media dir., Philip D. Matz
Vp.-med. grp. head, Elton Krugr
Suprs. & planners, Lee Wilson; K. Bentley (Dealer Assns.)

37.
SEAGRAM liquors
Seagram Distillers Co.

	media dollars 1979	1980
Magazines	$35,629,000	$32,122,000
Supps	2,077,000	2,140,000
Newspapers	3,324,000	4,397,000
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	2,121,000	3,707,000
Total	**$43,151,000**	**$42,366,000**

Classification: liquor (LNA F-330)
Marketing/brand management:
Exec. vp-mktg., Joel Weiner
Agencies: Warwick, Welsh & Miller, New York
Group sr. vp, mgmt. supr., James Driscoll
Group sr. vp-media and administration, John Meskil
Sr. vp-media dir., Dom Spoto
Vp-media supr., Gorgon Bring
Vp-media supr., Peter Dalton
Vp-media supr., Jerry Seuferling
Media supr., Marilyn Alterman
William Esty, New York
Sr. vp-management supr., John Scott
Sr. vp-media, Peter Triolo
Vp-account supr., Stanley Joyce
Vp. assoc. media, dir., G. Grennan

38.
AMERICAN
American Airlines

	media dollars 1979	1980
Magazines	$ 1,996,000	$ 4,081,000
Supps	40,000	172,000
Newspapers	12,706,000	17,158,000
Network tv	1,130,000	1,056,000
Spot tv	9,411,000	10,949,000
Network radio	—	—
Spot radio	3.540,000	7,977,000
Outdoor	309,900	565,000
Total	**$29,132,000**	**$41,958,000**

Classifications: passenger travel (LNA T-410); freight (LNA B-610)
Marketing/brand management:
Vp-pass. sales/adv., R. W. Baker
Dir.-adv., Ann S. Boylan
Mgrs.-adv.: Judith A. Kirvan, David Witt, Bruce Goodyear
Dir.-sls. prom., Frank J. DiNuzzo
Mgr. adv. admin. G. Mavico
Agency: DDB, New York
Grp. sr. vp-Peter Falcone
Sr.-vp-mgmt. supr., Dennis Byrnes
Sr. acct. execs.: Steve Haber, William Jackson
Sr. vp-dir. media ser., Sy Goldis
Vp-media plng. dir., John Pansuti
Assoc. media plng. dirs.: Janet Shechter, Henry Peterson

39.
OLDSMOBILE cars
General Motors

	media dollars 1979	1980
Magazines	$ 8,670,000	$ 9,356,000
Supps	478,000	—
Newspapers	4,709,000	7,794,000
Network tv	9,904,000	10,457,000
Spot tv	4,465,000	10,836,000
Network radio	447,000	837,000
Spot radio	424,000	1,871,000
Outdoor	98,000	522,000
Total	**$29,195,000**	**$41,673,000**

Classification: passenger cars (LNA T-110)
Marketing/brand management:
Adv. mgr., Charles Strong
Asst. adv. mgr., Ray Juracek
Agency: Leo Burnett, Southfield, Mich.
Exec. vp-mgr., Jack Ryan
Vp-acct. supr., Roger K. Bailey
Vp-media dir., Joe Henry

40.
GMC
General Motors Corporate

	media dollars 1979	1980
Magazines	$14,127,000	$11,512,000
Supps	3,811,000	350,000
Newspapers	7,360,000	3,775,000
Network tv	19,844,000	24,850,000
Spot tv	1,165,000	263,000
Network radio	1,920,000	399,000
Spot radio	3,203,000	—
Outdoor	1,005,000	36,000
Total	**$52,575,000**	**$41,125,000**

Classifications: general promotion (LNA T-111-8)
Marketing/brand management:
(Corporate advertising)
Vp-mktg., R. D. Burger
Exec. dir., mktg., J. N. Stewart
Ad. mng., D. J. Teasdale
Asst. ad. mng., J. W. Finney
Asst. ad. mgr., D. K. Murley
Asst. adv. mgr., D. J. Bolen
(public affairs advertising)
Vp-pub. rel., J. W. McNulty
Ad. man., G. H. Pruette

Asst. a.m., Christy L. Woods

Agencies: D'Arcy-MacManus & Masius, Bloomfield Hills, Mich.

Vice chmn./mgmt, supr., Milton F. Coulson, Jr.

Vp-acct. supr., William A. Mara, Jr.

Acct. super, GM cons. Prot. Plan, Leo A. Hillebrand, Jr.

Vp-med. dir., Robert Spaulding

UniWorld Group, New York

Pres., Byron Lewis

Acct. exec., Bernard Baskett

N. W. Ayer, Detroit

Vp, gen. mgr., Robert Kingsbury

Vp, acct. super., Richard Prince

Vp, med. dir., Randall Schroeder

41.

DU PONT

E. I. Du Pont

	media dollars 1979	media dollars 1980
Magazines	$14,274,000	$20,536,000
Supps	1,224,000	1,581,000
Newspapers	78,000	283,000
Network tv	15,764,000	15,729,000
Spot tv	2,536,000	2,210,000
Network radio	—	22,000
Spot radio	280,000	244,000
Outdoor	10,000	4,000
Total	**$34,166,000**	**$40,609,000**

Classifications: manufactured materials (LNA B-510); paints (LNA H-541); apparel fabrics (LNA A-170); automotive accessories (LNA T-150)

Marketing/brand management:

Dir. mktg. comm., H. Lloyd Taylor

Adv. mg'rs., J. M. Murray, 2nd (paint), John Swajeski (auto products and Corian), John E. Sly (Teflon)

Adv./prom. reps. E. R. Albright (men's apparel)

Frank Ockenfels (Qiana)

Duane Roach (Womenswear/Dacron)

Al Carnavale (Sweaters)

Carol Gee (Int. App.)

F. Kelly (Craft Yarns)

B. Bispham (Home Furn)

I. J. Kappes (Men's Hosiery)

Agencies: N. W. Ayer, New York (Paint, Teflon, Corian)

Sr. vp-mgmt. supr., Mark Bollman

Sr. vp-media dir., Marcella Rosen

BBDO, New York

Sr. vp-mgmt. supr., Bernie Gross

Vp-assoc. media dir., Bill Wiener

Vp-asst. media dir., Mike Bienstock

Grp. planning supr.: Beth LeMasurier; Robert Altmaier (Teflon carpet), John Brett (Antron); Griff Harrison (Antron)

Vp-acct. supr., Tom Kiely (auto prods.), Ed Carrington (fibers)

Acct. suprs.: Frost Jackson (corporate), Pam Gould (fibers)

42.

JOHNSON'S products

Johnson & Johnson

	media dollars 1979	media dollars 1980
Magazines	$ 3,004,000	$ 6,688,000
Supps	673,000	1,322,000
Newspapers	2,142,000	868,000
Network tv	26,320,000	28,859,000
Spot tv	3,418,000	2,505,000
Network radio	—	314,000
Spot radio	167,000	610,000
Outdoor	10,000	—
Total	**$35,734,000**	**$40,298,000**

Classifications: hair products (LNA D-140); skin lotions (LNA D-216); diapers (LNA A-121)

Marketing/brand management:

Gen. mgr. (toiletries), P. M. Lonergan

Gen. mgr. (disposables), E. West

Agencies: Y&R, New York

Mgmt. supr., Gene O'Sullivan

Sr. vp.-dir. planning, Polly Langbort

Media supr., Ellen Oppenheim

SSC&B, New York

Sr. vp-mgmt., supr., Barry Ofstedal

Assoc. med. dir., Janice Clements

Asst. med. dir., Mae Ling

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Drawing to determine ballot

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  24,455 Increase Sunday
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- **More Upper Income Readers ($35,000 or More)**
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- **Better Readership Among Professionals and Managers**
  63% Share
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43.
EASTERN
Eastern Air Lines

	media dollars 1979	1980
Magazines	$ 4,261,000	$ 4,617,000
Supps	84,000	189,000
Newspapers	12,396,000	19,814,000
Network tv	1,201,000	1,963,000
Spot tv	5,418,000	6,346,000
Network radio	—	—
Spot radio	3,942,000	5,342,000
Outdoor	1,824,000	1,911,000
Total	**$29,216,000**	**$40,182,000**

Classifications: passenger travel (LNA T-410); freight (LNA B-610)

Marketing/brand management:
Vp-adv., William H. Dowse
Mgr. adv. ser., Robert A. Wolf

Agency: Y&R, New York
Sr. vp-mgmt. supr., Eugene O'Sullivan
Acct. exec., Mark Linden
Vp-media grp. supr., Joe Mannix
Media supr., David Verklin
Vp-acct. supr., Robert J. Donahoe

44.
BUICK cars
General Motors

	media dollars 1979	1980
Magazines	$ 7,197,000	$ 4,601,000
Supps	—	56,000
Newspapers	6,801,000	5,282,000
Network tv	16,907,000	15,349,000
Spot tv	3,210,000	12,721,000
Network radio	810,000	854,000
Spot radio	759,000	705,000
Outdoor	430,000	363,000
Total	**$36,114,000**	**$39,931,000**

Classification: cars (LNA T-110)

Marketing/brand management:
Vp-gen. mgr., L. E. Reuss
Gen. sales mgr., J. D. Duffy
Asst. gen. sales mgr., J. J. Faerber
Dir. adv., Harold E. Savage

Agency: McCann-Erickson, Detroit
Exec. vp-mgmt. off.: W. A. Murphy, H. W. Grusche
Vp-acct. supr., [illegible]. Sale
Vp-media dir., W. Brien Schweikart

45.
AMERICAN EXPRESS
American Express

	media dollars 1979	1980
Magazines	$ 5,864,000	$ 5,846,000
Supps	13,000	193,000
Newspapers	2,028,000	2,168,000
Network tv	15,160,000	15,612,000
Spot tv	10,185,000	11,342,000
Network radio	—	933,000
Spot radio	534,000	1,624,000
Outdoor	27,000	5,000
Total	**$33,811,000**	**$37,723,000**

Classifications: financial (KNA B-150); travel services (LNA T-420)

Marketing/brand management:
Vp-marketing, No. Amer., Richard McCaffrey
Vp, Richard Kotz (card)
Vp-adv.; Dick Rosenbloom, Bill Zins (cheques)
Vp.-mktg. serv., Ron Friedman (travel & lodging)

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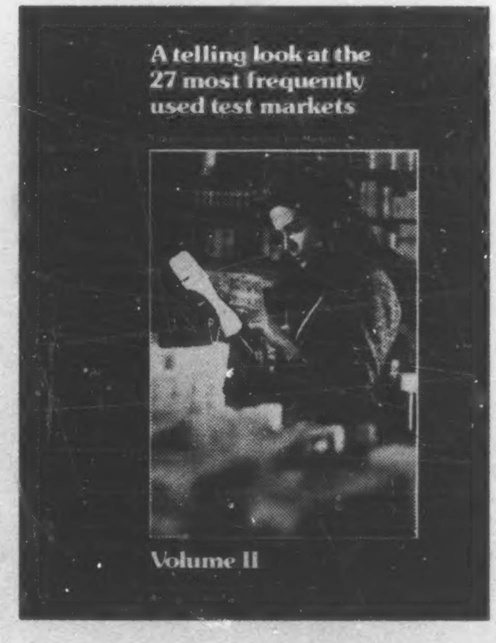

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Agency: Ogilvy & Mather, New York
Sr. vp-mgmt. supr., Brendan Ryan
Sr. vp-assoc. media dir., Wilma Epstein
Sr. vp-mgmt. supr., Shelly Lazarus (card)
Vp-mgmt. supr., Michael Newbrand cheques)

46.
POLAROID cameras and film
Polaroid

	media dollars 1979	media dollars 1980
Magazines	$ 5,632,000	$ 5,140,000
Supps	196,000	158,000
Newspapers	2,420,000	900,000
Network tv	27,091,000	29,813,000
Spot tv	2,902,000	905,000
Network radio	—	413,000
Spot radio	—	—
Outdoor	—	5,000
Total	**$38,241,000**	**$37,334,000**

Classification: cameras (LNA G-230)
Marketing/brand management:
Vp. mktg., commun., Theodore Voss
Dir. No. Amer. adv., James Andrews
Dir. U.S. cons. advert., Laurence Beeson
Grp. adv. mgr., Harry Falber
Ad. mgr., Richard Grachetti
Asst. adv. mgr., Stephan Bassett
Inter. adv. dir., J. Michael Parker
Adv. mgr. (industrial), Adrian VanDorpe
Agency: Doyle Dane Bernbach, New York
Grp. sr. vp, James V. McConnell, Jr.
Media planning dir., Conant Sawyer
Vp-assoc. media planning dir., Steve Caputo
Asst. media planner, Angelo Kalogiannia, Steve Rosenblum, Elizabeth Saslow, Chris Tinkham

47.
ABC
American Broadcasting

	media dollars 1979	media dollars 1980
Magazines	$15,136,000	$17,435,000
Supps	—	—
Newspapers	10,891,000	11,808,000
Network tv	—	—
Spot tv	3,941,000	4,772,000
Network radio	709,000	2,067,000
Spot radio	304,000	213,000
Outdoor	591,000	677,000
Total	**$31,572,000**	**$36,972,000**

Classifications: tv stations (LNA B-440); radio stations (LNA B-430)
Marketing/brand mangement:
(tv network)
Vp-adv., John T. Curry, Jr.
Dir. adv. services, Paul W. Barrett
(owned tv stations)
Adv. mgr., Russell Roney
Agencies: McCaffrey & McCall
(TV network)
Sr. vp-acct. exec., Radford Stone
Acct. exec., Bill Bolster, John Mulholland, Pat Corrigan
Vp-media dir., Harris Lefkon
Assoc. media dir., Hans Zucker
Media supr., Grace Mathias
Grey, New York
(Movies, ABC Theatre)
Vp, Donald Foley
Acct. supr., Robert Grifin

48.
PONTIAC cars
General Motors

	media dollars 1979	media dollars 1980
Magazines	$ 6,976,000	$ 4,908,000
Supps	—	—
Newspapers	7,199,000	5,114,000
Network tv	13,583,000	13,834,000
Spot tv	8,206,000	12,152,000
Network radio	54,000	—
Spot radio	1,598,000	339,000
Outdoor	70,000	317,000
Total	**$37,686,000**	**$36,664,000**

Classification: cars (LNA T-110)
Marketing/brand management:
Dir. mdsg., James Graham
Agency: D'Arcy-MacManus & Masius, Bloomfield Hills, Mich.
Chairman, H. G. Bay
President, J. T. Doyle
Sr. vp-dir. media, mktg. & research, Lucien DiSalvo
Vp-media dir., Robert Spaulding
Sr. vp.-mgt. super., John Greening
Vp. acct. super., Lief Erickson

49.
COLUMBIA motion pictures
Columbia Pictures

	media dollars 1979	media dollars 1980
Magazines	$ 953,000	$ 1,172,000
Supps	—	53,000
Newspapers	223,000	123,000
Network tv	11,427,000	27,121,000
Spot tv$9,554,000	9,554,000	5,141,000
Network radio	—	—
Spot radio	1,840,000	2,698,000
Outdoor	76,000	9,000
Total	**$24,073,000**	**$36,317,000**

Classification: movies (LNA G-310)
Marketing/brand management:
Vp-adv. & promo., Steve Astor
Agency: Stursberg & Hewitt
Mktg. serv., David Stone
Med. dir., Lynn Promotion, Gerry Rosen

50.
WRIGLEY gum
Wm. Wrigley, Jr.

	media dollars 1979	media dollars 1980
Magazines	—	$ 611,000
Supps	$ 24,000	—
Newspapers	900,000	517,000
Network tv	16,494,000	24,561,000
Spot tv	22,952,000	8,617,000
Network radio	1,247,000	1,143,000
Spot radio	1,899,000	168,000
Outdoor	—	—
Total	**$43,516,000**	**$35,617,000**

Classification: gum (LNA F-210)
Marketing/brand management:
Vp-marketing, Ron Cox
Asst. vp-adver., Henry Berchert
Marketing mgrs., Niels Hoegh-Guldberg
Gary Bebee, Chuck Warchol
Agencies: BBDO, Chicago
Exec vp., Eric Harkna
Acct. supers., Andrew Donchak, Walt Waschik
Executive director of media, Leonard Kay
Director of spot buying, Joanne Evans
Needham, Harper & Steers, Chicago
VP media, Thomas McAlevey
Media supr., Carol Moberg

51.
DELTA
Delta Air Lines

	media dollars 1979	media dollars 1980
Magazines	$ 1,390,000	$ 809,000
Supps	—	—
Newspapers	17,907,000	20,133,000
Network tv	89,000	—
Spot tv	3,207,000	4,598,000
Network radio	—	—
Spot radio	5,939,000	8,045,000
Outdoor	1,300,000	1,312,000
Total	**$29,832,000**	**$34,897,000**

Classification: travel (LNA T-410)
Marketing/brand management:
Sr. vp-mktg., J. A. Cooper
System mgr.-adv., Lee Sport
Agency: BDA/BBDO, Inc., Atlanta
Pres./mgmt. supr., Glenn Verrill
Vp-acct. supr., Jack Walz
Vp/media dir., Martin Hollinger

52.

NESTLE foods

The Nestle Co.

	media dollars	
	1979	1980
Magazines	$ 1,412,000	$ 1,700,000
Supps	294,000	168,000
Newspapers	3,359,000	1,424,000
Network tv	20,938,000	16,745,000
Spot tv	18,833,000	13,190,000
Network radio	847,000	1,031,000
Spot radio	486,000	122,000
Outdoor	—	121,000
Total	**$46,169,000**	**$34,501,000**

Classifications: confectionery (LNA F-210); food beverages (LNA F-170); cooking products (LNA F-110)
Marketing/brand management:
Dir. adv., Dewey Yeager
A.M.'s, Steven Merry, Isabel Torbert
Adv. asst., R. W. Sperry
Mgr., new products, Kenneth Murphy
Grp. vp-coffee & tea, W. I. Savel
Mktg., mgr. (coffee), Tom McInerny
Tea mktg. mgr. (Culinary), Thomas Tanski
Mktg. mgr. (chocolate/culinary, Frank Arthofer
Grp. vp-food service, commercial & specialty business, Steve Phillips
Agencies: NW Ayer, New York
Sr. vp-mgmt. supr., Stan Mattison
Vp-acct. suprs., Fred Axelrod, Lee Robin, Judith Greenberg
Sr. vp-media dir., Marcella Rosen
Assoc. media dirs., Beth Gordon
Leo Burnett, Chicago
Cheese morsels, chocolate drinks, new cookery, new products
Sr. vp-plans bd. chmn., J. Wiley
Mgmt. dir., B. Smith
Acct. supers., Mike O'Neal, Garrett Kroll, Jerry Conner, Michael Allen
Assoc. media dir., Dick Hobbs
Media suprs., David Selby, Nancy Fochtman

53.

TWA

Trans World Airlines

	media dollars	
	1979	1980
Magazines	$ 812,000	$ 2,071,000
Supps	12,000	28,000
Newspapers	10,933,000	17,427,000
Network tv	406,000	1,493,000
Spot tv	10,246,000	8,810,000
Network radio	553,000	—
Spot radio	2,864,000	4,637,000
Outdoor	61,000	26,000
Total	**$25,887,000**	**$34,492,000**

Classification: passenger travel (LNA T-410)
Marketing/brand management:
Staff vp-pass. mktg., Larry Toulouse
Agency: Ogilvy & Mather, New York
Sr. vp media dir., Ken Caffrey, Jr.
Vp assoc., media dir., Jack Deitchman
Mgmt. supr.-leisure, Steven Morvay, Kelly O'Dea
Mgmt. supr., Max Bisset

54.

GILLETTE toiletries

Gillette

	media dollars	
	1979	1980
Magazines	$ 1,296,000	$ 3,154,000
Supps	—	174,000
Newspapers	569,000	341,000
Network tv	24,552,000	25,456,000
Spot tv	4,743,000	5,010,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Total	**$31,160,000**	**$34,135,000**

Classifications (LNA): D-124 deodorants, D-126 men's shaving equipment, D-127 women's shaving equipment, D-128 combination copy, D-144 hair dryers & stylers, D-221 appliances & equipment
Marketing/brand management:
Vps-mktg., Derek Coward (safety razor) Robert Ray (President, appliances) Robert Forman (personal care)
Vp-adv. services, Thomas Ryan
Dir.-media services, Allen Gibbs
Dir.-media buying, Thomas Lux
Dir-network buying, Howard Fisher
Dir-prom. serv., Robert Evans
Agencies: BBDO, New York
(Right Guard)
Sr. vp.-mgmt. supr., Jack Thorne
Acct. supr., Jackie Follett
Vp. associate media dir.. Jane Fuller
Asst. media dir., Mike Hedge
(Trac II, Good News, Atra, Swivel)
Vp-mgmt. supr., William Badger
Assoc. media dir., Jane Fuller
Media supr., Mike Hedge
Grey-North, Chicago
(Gillette personal care appliances)
Vp-mgmt. supr., Ralph Linder
Acct. super., Erric Brown
Media dir., Don Willenburg
Marschalk, New York
(Tame, Foamy, Trac II Shave Cream, Daisy, Just Whistle, Flair)
Acct. supers., David Sullivan, Peter Balint, Leslie Green
Vp-mgmt. supr., John Dooner
Exec. vp-media dir., Art Wilen
Media Supr., Steve Segal
McCann-Erickson, New York
(Atra Razor)
Vp-mgmt. supr., Don Dillon
Acct. supr., Richard Costello
Media supr., Vince Tortorelli

55.

HONDA cycles and cars

Honda Motor

	media dollars	
	1979	1980
Magazines	$ 9,005,000	$10,657,000
Supps	129,000	216,000
Newspapers	1,638,000	2,936,000
Network tv	13,649,000	15,625,000
Spot tv	869,000	3,183,000
Network radio	—	299,000
Spot radio	3,000	—
Outdoor	1,299,000	1,033,000
Total	**$26,592,000**	**$33,949,000**

Classifications: motorcycles (LNA G-440); passenger cars (LNA T-110)
Marketing/brand management:
(passenger cars)
Natl. adv. & sls. prom. mgr., Joe Haight
Sr. adv. asst., Kathy Carey
(motorcycles)
Natl. adv. mgr.. B.W. Pulskamp
Adv. assts., Dub Swim, Neil Leventhal, Wayne Toyota
Agencies: NH&S, Los Angeles
(Autos)
Sr. vp., Bob Welsh
Vp-acct. supr., Bill Hagelstein
Dailey Adv., Los Angeles
(Motorcycles)
Vp. mgmt. supr., Bill Moreland
Vp-med. dir., Marc Feidelson
Media planner, Rose Marie Dorn
Media buyer, Liz Nestel

56.

MICHELOB beer

Anheuser-Busch

	media dollars	
	1979	1980
Magazine	$ 3,666,000	$ 2,019,000
Supps	—	—
Newspapers	174,000	384,000
Network tv	25,423,000	26,032,000
Spot tv	1,146,000	1,622,000
Network radio	1,396,000	670,000
Spot radio	1,898,000	2,573,000
Outdoor	62,000	323,000
Total	**$33,765,000**	**$33,623,000**

Classification: beer (LNA F-310)
Marketing/brand management:
Vp-mktg., Michael J. Roarty
Group mktg. mgr., Robert McDowell

Prod. mgrs.: Henry J. Cardello (Michelob), Mike Orloff (Michelob Light)

Agency: D'Arcy-MacManus & Masius, St. Louis

Vp. group supr., David Drew (Michelob and Michelob Light)

Vp. acct. exec., Mark Polan (Michelob)

Acct. supr., Dave Gulick (Michelob), Todd Abrams (Michelob Light)

Acct. execs., Jeff Kuehl (Michelob Light), Dave Gulick (Michelob)

Group media planning mgr., Mike Nyikes (Michelob Light)

Assoc. media dir., Glenn Dewees (Michelob), Michael Nyikes (Michelob Light)

57.

SANKA coffee

General Foods

	media dollars 1979	1980
Magazines	$ 1,782,000	$ 2,184,000
Supps	360,000	998,000
Newspapers	809,000	946,000
Network tv	15,011,000	19,954,000
Spot tv	3,550,000	7,879,000
Network	—	—
Spot radio	40,000	1,407,000
Outdoor	—	60,000
Total	**$21,552,000**	**$33,428,000**

Classification: coffee (LNA F-171)

Marketing/brand management:

Grp. product mgr., Martha Crosby Jacobs

Assoc. product mgr., Troy Davis

The media group includes:

Dir., media serv., David Braun

Assoc. media dir., P. E. Kane

Grp. mgr. media plng., Don Miceli

Assoc. mgr. natl. plng., Keith Landau

Agency: Young & Rubicam

Acct. supr., Anne Zopf

Vp.-med. grp. super., Dave Fulton

Media supr., Mark Arnold

58.

POST cereals

General Foods

	media dollars 1979	1980
Magazines	—	$ 46,000
Supps	$ 225,000	561,000
Newspapers	375,000	269,000
Network tv	16,570,000	25,322,000
Spot tv	11,128,000	7,192,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Total	**$28,298,000**	**$33,390,000**

Classification: cereals (LNA F-122)

Marketing/brand management:

Gen. mgr., William Korab

Dir., media serv., David Braun

Assoc. media dir., P. E. Kane

Ogilvy & Mather, New York

Sr. vp-mgmt. supr., Steve Humphrey

Sr. vp-assoc. media dirs.: Tony Nacinovich, Wilma Epstein

Asst. media dir., Andrea McAteer, Ray Simko, Alan Orlick, Bert delos Reyes

Grey, New York

Mgmt. rep., Dick O'Brien

Mgmt. supr., Tom Aydelotte

Assoc. media dir., Alec Gerster

59.

NBC radio/tv

RCA Corp.

	media dollars 1979	1980
Magazines	$11,450,000	$13,681,000
Supps	—	9,000
Newspapers	12,839,000	15,488,000
Network tv	—	—
Spot tv	1,443,000	2,542,000
Network radio	404,000	1,410,000
Spot radio	388,000	116,000
Outdoor	9,000	39,000
Total	**$26,533,000**	**$33,285,000**

Classifications: tv stations (LNA B-440); radio stations (LNA B-440)

Marketing/brand management:

Vp-adv. & creative services, Buck Biggers

Vp-adv. & operations, Frank Pintauro

Vp-on air promotion, and print copy Paula Mermelstein

Vp-art & design, Charles Blake

Vp-mktg. serv., Kevin Cox

Vp-mktg. development, Charlie Strehan

Agency:McCann-Erickson, New York

Acct. supr., Les Greenwald

Acct. exec., Martha Sullivan

Mgmt. surp., Rob Ravitz

Vp-group head, Vincent Tortorelli

60.

PILLSBURY foods

Pillsbury

	media dollars 1979	1980
Magazines	$ 4,682,000	$ 3,386,000
Supps	43,000	—
Newspapers	1,447,000	683,000
Network tv	25,902,000	20,887,000
Spot tv	7,342,000	7,554,000
Network radio	—	314,000
Spot radio	199,000	10,000
Outdoor	—	—
Total	**$39,615,000**	**$32,834,000**

Classifications: bakery goods (LNA F-160); cooking products (LNA F-110); prepared foods (LNA F-120)

Marketing/brand management:

Vp-general manager: Raymond Kimrey (refrigerated products), Thomas McBurney (dry grocery products), Kent Larson (frozen products), Don Osell (diversified products), Graham Francis (beverages), William McGrath (business development)

Directors of marketing: Richard Nickel (frozen pizza), Larry Youngblood (pasta, flour, potatoes), Pete Mihajlov (refrigerated foods), Daniel Locke (desserts & weight control)

Director-media services: William Edgley

Agencies: Leo Burnett, Chicago

Sr. vp-management dir., Bill Boris

Account supr.: John Miller

Assoc. media dirs.: Lincoln Bumba

BBDO, New York

Sr. vp. mgmt. super., Jerry Lee

Acct. super., Lonny Strum

Assoc. med. dir., Mike Drake

Asst. med. dir., Bruno Crea

Paragon Companies, Minneapolis

Acct. supr., Phil Hummel

Media dir., Steve Anderson

Botsford-Ketchum, San Francisco

Mgmt. suprs.: Robert Kroyer

Assoc. med. dir., Cheryl Kahn

Acct suprs.: Craig Brannigan

Vp-media dir., Al Larson

J. Walter Thompson, Chicago

Mgmt. supr., Harvey Scholnick

61.

WARNER

Warner Communications

	media dollars 1979	1980
Magazines	$ 700,000	$ 812,000
Supps	—	—
Newspapers	—	192,000
Network tv	11,102,000	24,181,000
Spot tv	8,493,000	4,901,000
Network radio	119,000	21,000
Spot radio	978,000	2,362,000
Outdoor	400,000	297,000
Total	**$21,792,000**	**$32,766,000**

Classification: amusements (LNA G-320)

Marketing/brand management:

Vp-creative advertising, Joel Wayne

Vp-dir. of media, Mardi Marans

Exec. vp-worldwide adv., Sandy Reisenbach

Eastern adv. publ. dir., George Nelson

Eastern ad. mgr., Don Buckley

Agencies: Burbank Advertising, Burbank (house agency)
Adv. dir., (records), Shelley Cooper
Grey Advertising, New York
(Motion pictures)
Acct. supr., Len Fogge
Vp-assoc. media dir., Richard Thaler

62.
SEVEN-UP soft drink
Philip Morris

	media dollars 1979	1980
Magazines	$ 433,000	—
Supps	1,266,000	$ 646,000
Newspapers	2,469,000	1,301,000
Network tv	19,188,000	21,321,000
Spot tv	3,360,000	3,992,000
Network radio	—	—
Spot radio	—	4,221,000
Outdoor	1,873,000	446,000
Total	**$28,589,000**	**$31,927,000**

Classification: soft drinks (LNA F-220)
Marketing/brand management:
Sr. vp-corp. mktg., A. J. Bissmeyer III
Dir. dist. plng., Todd Ryan
Dir. mktg. services, James Perabo
Vp-brand mgmt., David Smith
Vp-media & mktg. serv. Ralph Countryman
Agency: N. W. Ayer, New York
Exec vp-mgmt. supr., Dominick Rossi
Sr. vp-mgmt. supr., Dominick Rossi
Acct. execs.: Duncan Gray, Pip Muir, Kathy Hayes, Chris Hooper, Howard Sherman
Mgmt. supr., Steve Bretschneider
Acct. supr., Keith McCarren, Jim Haag
Assoc. media dir., Allen Brivie
Media suprs., Rich Alcott (regular) Mimi Ritter (diet)
Media planners, Jim Cadwell (regular), Abbie Van Nostrand (diet)
Asst. plan., Roberta Reissman

63.
CAMBRIDGE cigarettes
Philip Morris

	media dollars 1979	1980
Magazines	—	$11,148,000
Supps	—	743,000
Newspapers	—	16,466,000
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	—	3,503,000
Total	—	**$31,860,000**

Classification: tobacco (LNA G-110)
Marketing/brand management:
Brand mgr., Herb Foster
Agency: Leo Burnett, Chicago
Acct. exec., Tom Dudreck

64.
KOOL cigarettes
BAT Industries

	media dollars 1979	1980
Magazines	$ 9,555,000	$11,820,000
Supps	2,688,000	3,766,000
Newspapers	6,536,000	3,787,000
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	10,070,000	12,382,000
Total	**$28,849,000**	**$31,755,000**

Classification: tobacco (LNA G-110)
Marketing/brand management:
Sen. prod. mgr., Line Lewis
Mgr. media services, Tom Neville
Asst. media mgr., Fran Canary
Agencies: Lanning Law & Walsh, Chicago
(media only)
Planning dir., Karen Hendrickson

65.
OIL OF OLAY
Richardson-Vick

	media dollars 1979	1980
Magazines	$ 2,136,000	$ 2,758,000
Supps	—	—
Newspapers	—	—
Network tv	12,732,000	26,499,000
Spot tv	674,000	2,481,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Total	**$15,542,000**	**$31,738,000**

Classification: cosmetics (LNA D-110)
Marketing/brand management:
Dir. of media, Irwin Fleischer
Media coordinator, Evelyn Fitzsimmons
Mktg. mgr., Peter Wilson
Agency: Young & Rubicam, New York
Acct. supr., John Foote
Vp-med. grp. super., Carla Pascale
Med. super., Donna Campanella
Sr. planner, Debbie Rath

66.
CBS tv/radio
CBS Inc.

	media dollars 1979	1980
Magazines	$15,920,000	$17,292,000
Supps	—	4,000
Newspapers	8,388,000	7,870,000
Network tv	76,000	856,000
Spt tv	2,453,000	1,427,000
Network radio	3,505,000	3,146,000
Spot radio	—	100,000
Outdoor	387,000	896,000
Total	**$30,729,000**	**$31,591,000**

Classifications: radio stations (LNA B-430); television stations (LNA B-440)
Marketing/brand management:
Vp. creative dir. adv. & design, Louis Dorfman
Vp-mktg. commun., Warren Spellman
Agencies: Doyle Dane Bernbach, New York
Mgmt. supr., Lloyd Highbloom
Acct. supr., Mike Gordon
Media dir., Jack Cohen
Media planner, Stan Crayson, John McManus
W. B. Doner, Detroit
(CBS sports)
Acct. supr., Fred Doner

67.
CAMEL cigarettes
R. J. Reynolds

	media dollars 1979	1980
Magazines	$15,382,000	$13,973,000
Supps	5,358,000	290,000
Newspapers	11,106,000	9,051,000
Net tv	—	—
Spot tv	—	—
Net radio	—	—
Spot radio	—	—
Outdoor	8,833,000	7,851,000
Total	**$40,679,000**	**$31,165,000**

Classification: tobacco (LNA G-110)
Marketing/brand management:
Dir. mktg. serv., Marty Orlowski
Dir. media, Dan Pearson
Grp. planning mgr., Bernie Bauguess
Brand plng. mgr., Liz Marcotuillio
Brand mgr., J. Shoustek
Agency: BBDO
Sr. vp-exec. committee rep., Larry Light
Vp-mgt. supr., Jerry Lee
Acct. supr., Bob Pallotta

68.

AMERICAN cars

American Motors

	media dollars	
	1979	1980
Magazines	$ 4,648,000	$ 5,749,000
Supps	—	—
Newspapers	5,949,000	1,358,000
Network tv	17,243,000	13,108,000
Spot tv	21,275,000	10,599,000
Netqork radio	—	—
Spot radio	27,000	347,000
Outdoor	284,000	7,000
Total	**$48,971,000**	**$31,148,000**

Classification: passenger cars (LNA T-110)

Marketing/brand management:

Dir. adv., Gene Richmond

Adv. mgr., Robert Wheat

Natl. media mgr., Fred Bennie

Agency: Grey Advertising, New York

Exec. vp, R. L. Berenson

Sr. vp-mgmt. supr., Bruce Wagner (Detroit)

Vp-mgmt. supr., Bud Allen

Assoc. media dir., Alec Gerster

Adv. mgr. (Jeep), Raymond Avedion

Adv. mgr. (Renault), Marvin H. Klein

69.

KENTUCKY FRIED CHICKEN

Heublein

	media dollars	
	1979	1980
Magazines	—	—
Supps	—	—
Newspapers	—	—
Network tv	$17,234,000	$16,772,000
Spot tv	14,322,000	12,641.000
Network radio	—	—
Spot radio	686,000	1,242,000
Outdoor	391,000	343,000
Total	**$32,633,000**	**$30,998,000**

Classification: restaurants (LNA G-330)

Marketing/brand management:

KFC-nat'l. co-op adv. program, Inc.

Pres., Paul Knopf

Vp-Mktg. dir., Phil Risingr

Secretary & Treasurer, Jack Shekell

Agency: Young & Rubicam, New York

Sr. vp-mgmt. dir., John McGarry

Vp. mgmt. supr., Ed Lebar

Vp.-med. super., Joe Mannix

70.

UNIVERSAL CITY studios

MCA, Inc.

	media dollars	
	1979	1980
Magazines	$ 879,000	$ 1,385,000
Supps	37,000	—
Newspapers	218,000	—
Network tv	6,818,000	15,564,000
Spot tv	12,157,000	8,599,000
Network radio	249,000	219,000
Spot radio	231,000	4,890,231
Outdoor	164,000	282,000
Total	**$20,753,000**	**$30,939,000**

Classification: Movies (LNA G-310)

Marketing/brand management:

Vp-mktg. research, Olen J. Earnest

Exec. vp-adv./public./promo., David A. Weitzner

Nat. dir./co-op adv., John Butkovich

Agency: Doyle Dane, Bernbach/West

Sr. vp, Simon Kornblitt

Sr. acct. exec., Susan Taylor

Asst. acct. exec., Larry Siegel

71.

LIPTON

Unilever

	media dollars	
	1979	1980
Magazines	$ 5,466,000	$ 4,376,000
Supps	125,000	69,000
Newspapers	811,000	505,000
Network tv	13,001,000	19,925,000
Spot tv	7,731,000	5,792,000
Network radio	—	—
Spot radio	189,000	167,000
Outdoor	243,000	99,000
Total	**$27,566,000**	**$30,933,000**

Classifications: prepared foods (LNA F-120); food beverages (LNA F-170)

Marketing/brand management:

Media dir., Norman V. Osborn

Agencies: TJL Media (in-house)

72.

MAZDA cars and trucks

Toyo Kogyo

	media dollars	
	1979	1980
Magazines	$ 4,959,000	$ 6,296,000
Supps	—	—
Newspapers	1,013,000	565,000
Network tv	14,983,000	20,335,000
Spot tv	7,318,000	3,539,000
Network radio	—	—
Spot radio	57,000	—
Outdoor	97,000	183,000
Total	**$28,427,000**	**$30,918,000**

Classifications: passenger cars (LNA T-110), trucks (LNA T-120)

Marketing/brand management

Sr. vp-general operations, R. E. Hayden (MMA Central)

Sr. vp.-genl. mgr., E. Sundstrom (MMA-East)

Agency: FC&B/Honig

Sr. vp. grp. mgmt. dir., Welton Mansfield

Vp. mgmt. dir., Dennis Remsing

73.

RCA video recorders, discs

RCA consumer electronics

	media dollars	
	1979	1980
Magazines	$ 8,543,000	$ 9,725,000
Supps	956,000	923,000
Newspapers	3,966,000	4,040,000
Network tv	13,859,000	13,524,000
Spot tv	3,083,000	2,545,000
Network radio	68,000	—
Spot radio	26,000	66,000
Outdoor	40,000	34,000
Total	**$30,541,000**	**$30,857,000**

Classification: tv sets (LNA H-310)

Marketing/brand management:

Pres., RCA sales, Arnold T. Valencia

Vp-consum. commun., James K. DeVoe

Natl. adv. mgr., Wm. S. Beres

Vp-marktg. oper., David H. Croner

Merch. mng., tv, Joseph P. Clayton

Merch. mng., VCR, James A. Gatman

Merch. mgr., Video Discs, Richard D. Levin

Agencies: Leo Burnett, Chicago (color tv sets)

Mgmt. dir., Dennis Dunlap

Acct. super., tv sets & VCR's, Jackson S. Brown

Acct. super., Video Disc, William Wohlfiel

Assoc. media dir., Stephanie English

74.

BENSON & HEDGES

Philip Morris

	media dollars	
	1979	1980
Magazines	$15,361,000	$15,652,000
Supps	2,243,000	3,260,000
Newspapers	6,524,000	6,597,000
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	6,502,000	5,264,000
Total	**$30,630,000**	**$30,773,000**

Classification: tobacco (LNA G-110)
Marketing/brand management:
Vp-brand & promotion, Robert Fitzmaurice
Brand mgr., William K. Cutler
Vp-media, James L. Thompson, Jr.
Agency: Wells, Rich, Greene, New York
Sr. vp, Alan Breward
Vp. acct. super., Ray Marione
Acct exec., John Marchese
Sr. vp.-corp. med. dir., Bob Geis
Vp. Planning Services Dir., Steve Ziglar
Plan. group head, Bernie Goldstein
Assoc. grp. head, Laura Greenberg
Media planner, Karen Harris

75.
CARLTON cigarettes
American Brands

	media dollars 1979	1980
Magazines	$10,032,000	$13,580,000
Supps	—	—
Newspapers	17,466,000	10,691,000
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	5,924,000	6,162,000
Total	**$33,402,000**	**$30,433,000**

Classification: tobacco (LNA G-110)
Marketing/brand management:
Adv. mgr., William J. Moore
Asst. adv. mgr., Donald R. Dugan
Prod. mgr., H. W. Bahrenburg
Media dir., Norman H. Chester
Agency: F. William Free, New York
Acct. execs.: Kent Leyman, Ann De Franco, Tom Keane
Sr. vp-media dir., John Hughes

76.
COLUMBIA records
CBS

	media dollars 1979	1980
Magazines	$ 9,566,000	$ 9,302.000
Supps	5,624,000	8,824,000
Newspapers	4,452,000	6,185,000
Network tv	2,442,000	2,916,000
Spot tv	6,894,000	2,502,000
Network radio	—	—
Spot radio	86,000	129,000
Outdoor	90,000	60,000
Total	**$29,154,000**	**$29,918,000**

Classification: records (LNA H-330)
Marketing/brand management:
Sr. vp-gen. mgr., Don Dempsey (Epic/Portrait/Assoc. labels)
Vp.-mktg., Ron McCarrell (Epic/Portrait/Assoc. labels), Joe Mansfield (Columbia)

Agencies: Gotham, New York
(In-house for CBS records)
Vp-adv. planning, Linda Barton
Media dirs., Yvonne Ericson (tv, print), Peggy Mulhall (radio)
Assoc. dir. print media, Joe Strickoff
Print media buyer, Vera Sutton

Wunderman, Ricotta & Kline, New York
(Record Club)
Sr. vp-acct. supr., Peter Rabar
Vp.-assoc. med. dir., Maxeen Schonfeld
Media super., Amelia Stellato
Media planner, Juliet Munoz
Media buyer, Craig Kalter

77.
REVLON cosmetics
Revlon

	media dollars 1979	1980
Magazines	$ 7,953,000	$ 6,974,000
Supps	59,000	158,000
Newspapers	169,000	546,000
Network tv	11,632,000	10,576,000
Spot tv	9,059,000	9,567,000
Network radio	—	46,000
Spot radio	670,000	1,073,000
Outdoor	5,000	—
Total	**$29,547,000**	**$28,940,000**

Classifications: cosmetics (LNA D-110); hair products (LNA D-140)

Marketing/brand management:
Exec. vp-adv., Sanford Buchsbaum
Media dir., Anthony Cozzolino
Vp-adv. services, George Feld
Adv. dir., Fred Rhines

Agencies: Grey, New York (Classic Revlon, Natural Wonder, Polished Ambers, Jontue, Flex, Colorsilk, All international)
Vp-mgmt. supr., Dave Kimble
Asst. media dir., Jim Bell
Grp heads, Russ Booth, Ken Ernst

Altschiller, Reitzfeld, Jackson, Solin/NCK, New York
(Milk Plus 6 & various cosmetics)
Vp.-med. dir., John Miceli
Pres., mgmt. super., Darrol Solin

78.
JELL-O desserts
General Foods

	media dollars 1979	1980
Magazines	$ 7,915,000	$ 5,969,000
Supps	47,000	25,000
Newspapers	42,000	131,000
Network tv	16,848,000	18,512,000
Spot tv	2,837,000	4,257,000
Network radio	—	—
Spot radio	14,000	3,000
Outdoor	—	—
Total	**$28,073,000**	**$28,897,000**

Classification: desserts (LNA F-115)
Marketing/brand management:
Grp. prod. mgr., James Kilts
Dir., media serv., David Braun
Assoc. media dir., P. E. Kane
Assoc. mgr. natl. plng., Brenda Jansen
Agency: Y&R, New York
Vp-mgmt. supr., Matt Crisci
Vp-media grp. supr., Diane Meskill
Media suprs., Jean Claude Ziegler, (gelatin), Susan Mark (puddings)

79.
SCHLITZ beer
Jos. Schlitz

	media dollars 1979	1980
Magazines	$ 228,000	$ 295,000
Supps	—	—
Newspapers	1,255,000	183,000
Network tv	31,429,000	15,677,000
Spot tv	7,257,000	8,146,000
Network radio	—	41,000
Spot radio	3,461,000	4,105,000
Outdoor	662,000	370,000
Total	**$44,292,000**	**$28,817,000**

Classification: beer (LNA F-310)
Marketing/brand management:
Sr. vp-mktg., Robert A. Rechholtz
Group dir.-mktg. serv., Robert Conners
Dir.-media, William J. Henke
Assoc. mgr., media serv., Kurt M. Weil
Dir.-Schlitz and Schlitz Light brands, James R. Remitz
Brand dir. Schlitz Malt liquor, Gary M. Truitt
Brand dir., Erlanger, John W. Watson
Brand dir. Old Milwaukee Thomas H. Schwalm
Agencies: J. Walter Thompson, Chicago (Schlitz)
Sr. officer, Ben Gilmore
Mgmt. supr., Baron Schlesinger
Acct. supr., Bob Ball

Assoc. mgr., Ken Ohr
Media supr., Steve Buerger
Media planners, Chris Thompson, Constance Garace
Benton & Bowles, New York (Schlitz Malt Liquor,
Mgmt. supr., John Fenton
Assoc. media dir., Rich Hamilton
Media planner, Sue Danaher
BBDO, New York
(Old Milwaukee & Old Milwaukee Light)
Acct. Supervisor, Macy Jones
Acct. Executive, Buzz Sawyer
Asst. Media Dir., Dave Capano
Planning Supervisor, Mike Hedge
Assoc. Dir., Pete Stassi
Vice Pres. Media Dir., Al Goldin
Vp-Mgt. super., John Dunning

80.
LEVI'S clothing
Levi Strauss

	media dollars	
	1979	1980
Magazines	$ 2,852,000	$ 3,676,000
Supps	38,000	—
Newspapers	52,000	290,000
Network tv	17,342,000	14,962,000
Spot tv	5,590,000	3,788,000
Network radio	—	—355,000
Spot radio	3,563,000	5,663,000
Outdoor	—	2,000
Total	**$29,437,000**	**$28,736,000**

Classification: sportswear (LNA A-115)
Marketing/brand management:
Marketing Council: Frank Brann, Jack Detlefs, Robert Grohman, Robert Haas, David Kaled, Hal Spielberg, Tom Tusher
Mgr.-mktg. serv., John Ankeny (Womenswear)
Dir. mktg. serv., Janet Beach (Jeanswear)
Mgr.-mktg. serv., Jo Ann Flath (Youthwear)
Dir.-con. mktg., Steve Goldstein (Menswear)
Mgr.-mktg. serv., Dave King (Activewear)
Agencies: FCB/Honig, San Francisco
Sr. grp. mgmt. supr., John Johnson
McCann-Erickson, San Francisco
Acct. super., Dick Boulton
Botsford Ketchum-San Francisco
Vp-acct. supr., Dan Odishoo

81.
CREST toothpaste
Procter & Gamble

	media dollars	
	1979	1980
Magazines	$ 2,542,000	$ 2,387,000
Supps	376,000	—
Newspapers	728,000	12,000
Network tv	18,130,000	23,140,000
Spot tv	4,906,000	3,110,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Total	**$26,682,000**	**$28,649,000**

Classification: dental supplies (LNA D-121)

Marketing/brand management:
Adv. mgr., Mark S. Levy
Dir. of media, Russ Condit

Agency: Benton & Bowles, New York
Mgmt. supr., Arty Selkowitz
Acct. supr., Norman Sherman
Vp-assoc. media dir., Frank Henderson
Asst. media dir., Jeri Dack

82.
CANON products

	media dollars	
	1979	1980
Magazines	$ 6,078,000	$ 9,948,000
Supps	—	134,000
Newspapers	489,000	661,000
Network tv	5,701,000	12,295,000
Spot tv	5,305,000	4,154,000
Network radio	287,000	841,000
Spot radio	39,000	32,000
Outdoor	163,000	179,000
Total	**$18,012,000**	**$28,244,000**

Classification: cameras (LNA G-230); business machines (LNA B-310)

Marketing/brand management:
Adv. mgrs.: T. Hirasawa (cameras), H. Hirai (copiers), H. Iwanami (calculators)

Agencies: Grey, New York
Vp, mgmt. supr., Larry Levy
Vp-assoc. media dir., John Jacobs

Dentsu, New York
Acct. supr., Frank Savareso
Media dir., Bill Barrett
Sr. media plnr., Rick Johnson

83.
TIME-LIFE
Time, Inc.

	media dollars	
	1979	1980
Magazines	$17,317,000	$17,659,000
Supps	960,000	1,123,000
Newspapers	2,641,000	2,529,000
Network tv	685,000	1,832,000
Spot tv	19,295,000	5,064,000
Network radio	552,000	—
Spot radio	108,000	6,000
Outdoor	5,000	6,000
Total	**$41,563,000**	**$28,219,000**

Classifications: books and music (LNA B-410); records (LNA H-330)

Marketing/brand management:
Vp. mktg. dir., Paul Stewart
Mktg. mgrs.: Bob Smith, Peter Barnes, Spencer Lambert, Tony Palms
Media administrators: Jessica Weiland, Channing Hadlock, Roger Wilson
Product managers: Diane Allison, Adriane Berner, Carol Kaplan, Yori Okuda, Lisa Schmucki

N W Ayer/Ayer Direct
Acct. supr., Michael Seymour
Acct. exec., Tom Grant
Media planner, Toni LaBonte
Wunderman, Ricotta & Kline, New York
Vp-management supr., Tom Knowlton
Acct. exec., Bob Palmer
Acct. supr., Worth Linen
Vp. assoc. med. dir., Maxeen Schonfeld
Media super, Rhoda M. Pawski
Planner/buyer, Virginia Molloy
Planner/buyer, Nancy Jones

A. Eicoff & Co., Chicago
Sr. vp-management, supr., Ron Bliwas
Vp-media dir., Francie Barson
Media buyers: Carol Krajewski, Sheilah Moran

84.
PLYMOUTH
Chrysler Corp.

	media dollars	
	1979	1980
Magazines	$ 1,229,000	$ 4,540,000
Supps	—	—
Newspapers	571,000	423,000
Network tv	9,667,000	15,644,000
Spot tv	3,205,000	3,063,000
Network radio	230,000	8,000
Spot radio	3,362,000	4,252,000
Outdoor	1,000	40,000
Total	**$18,265,000**	**$27,970,000**

Classification: passenger cars (LNA T-110)
Marketing/brand management:
Adv. dir., Doyle Lott
Agency: Kenyon & Eckhardt, Detroit
Sr. vp. mgmt. supr., Bruce McRitchie
Vp. acct. supr., Lynn Vernon
Sr. vp. media dir., Philip D. Matz
Vp.-med. grp. head, George Wold

85.
FOLGER'S coffee
Procter & Gamble

	media dollars	
	1979	1980
Magazines	$ 17,000	$ 6,000
Supps	—	76,000
Newspapers	1,372,000	563,000
Network tv	9,447,000	13,504,000
Spot tv	23,497,000	13,521,000
Network radio	—	—
Spot radio	59,000	6,000
Outdoor	—	—
Total	**$34,392,000**	**$27,676,000**

Classification: food bev. (LNA F-107).
Marketing/brand management:
Genl. mgr., P. A. Field
Dir. of media, Russ Condit
Adv. mgr., coffee, Tom Newby
Media asst., Patricia Grant
Agency: Cunningham & Walsh, New York
Sr. vp-dir. media/mktg. serv. Frank McDonald
Sr. vp-mgr. media plng., Howard Nass
Vp-grp. media dir., Marcia Chapman
Media supervisor, Audrey Siegel
Acct. super., Ellis Verdi
Asst. a.e. (flaked and Vacuum), Scott Stuart
Asst. a.e. (instant), Richard Rapp

86.
NABISCO food products
Nabisco

	media dollars	
	1979	1980
Magazines	$ 1,627,000	$ 2,997,000
Supps	55,000	297,000
Newspapers	509,000	580,000
Network tv	16,242,000	17,785,000
Spot tv	5,487,000	5,501,000
Network radio	250,000	—
Spot radio	592,000	157,000
Outdoor	—	—
Total	**$24,662,000**	**$27,317,000**

Classifications: bakery goods (LNA F-160); prepared foods (LNA F-120); confectionery (LNA F-210)
Marketing/brand management:
Vp.-dir.-mktg. (biscuits), J. Maxwell Enock
Vp-mktg., William McKnight (special prod.)
Adv. mgr. (biscuits) Dan Bonardi
Grp. brand mgrs., Ruth Brodsky (ready to eat cereals); Robert Bartz (hot cereals, Dromedary); Steven Wilkerson (pet foods), John Di Blasio (cookies), W. R. Stuart (crackers)
Vp-comm., Lee Abbott
Mgr. media services, Lou Rubinacci
Dir. mktg. (special prod.), George Erfurt
Dir. of mktg., Mel Perlmutter (snack foods)
Agencies: William Esty, New York
Sen. vp-media, Peter Triolo
Assoc. media dir., Joe Reese (special prod.), Phil Schwetz (biscuit)
Acct. suprs., John Hughes (biscuit); J. Wheaton (special prod.), R. Geyer (snack foods)
Mgmt. suprs., Jeff Greene (biscuits); Tom Hayes (special prods.); Andrew Allen (snack foods) (special products)
McCann-Erickson, New York
Mgmt. rep., Bob Wadsworth
Acct. supr., Gary Schwinder
Media dir., Lee Oakes

87.
IVORY soaps
Procter & Gamble

	media dollars	
	1979	1980
Magazines	$ 2,648,000	$ 518,000
Supps	—	—
Newspapers	68,000	23,000
Network tv	18,166,000	21,363,000
Spot tv	6,920,000	4,679,000
Network radio	—	—
Spot radio	9,000	1,000
Outdoor	—	—
Total	**$27,811,000**	**$26,584,000**

Classifications: soaps & detergents (LNA H-410); personal hygiene (LNA D-120)
Marketing/brand management:
Brand mgr., Roland La Plant
Dir. of media, Russ Condit
Agencies: Compton, New York
Mgmt. supr., Tom Lom, Med. mgr. Nancy Fastenberg (Ivory bar)
Media planner, Sande Pisik (Ivory Snow)
Mgmt. super., Stu Sharpe
Acct. super., Joe Lenene
Media mgr., John Ryan
Asst. med mgr., Maryanne Harmon
Planner, Ken Sacharan
Media mgr., Carol Karasick
Asst. media mgr., Steven Jacoby
Planner, Patricia Engel
Benton & Bowles, New York (Ivory Snow)
Mgmt. supr., Peter Greene
Acct. supr., D. Jones
Vp-assoc., media dir. Frank Henderson
Asst. media dir., Lillian Rodriguez

88.
TYLENOL tablets
Johnson & Johnson

	media dollars	
	1979	1980
Magazines	$ 2,117,000	$ 2,359,000
Supps	—	—
Newspapers	137,000	70,000
Network tv	21,047,000	23,273,000
Spot tv	369,000	793,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Total	**$23,670,000**	**$26,495,000**

Classification: headache remedies (LNA D-211)
Marketing/brand management:
Prod. dir., Sal Uglietta
Agency: Compton, New York
Acct. exec., Wyn Lydecker
Acct. supr., Justin Harrington
Mgmt. supr., Tom Lom
Media dir., Carol Karasick

89.
MAYBELLINE cosmetics
Schering-Plough

	media dollars	
	1979	1980
Magazines	$ 5,968,000	$ 5,820,000
Supps	—	—
Newspapers	—	—
Network tv	14,523,000	16,581,000
Spot tv	3,657,000	2,286,000
Network radio	1,389,000	1,524,000
Spot radio	120,000	34,000
Outdoor	—	—
Total	**$25,657,000**	**$26,245,000**

Classification: cosmetics (LNA D-110)
Marketing/brand management:
Vp.-mktg. (Face/Lip), Gary Mulloy
Vp.-mktg. (Eye/Nail), Chris Berry

Agency: Lake-Spiro-Shurman, Memphis
(house agency)
Vp.-adv./media/research, Bob Schreiber
Creative is handled by Marschalk (face and lip make-up)
Acct. supr., Barry Linsky
Ted Bates handles creative for eye and nail products.
Mgmt. rep., Joan Rothberg
Dir. media budget, Lynn Sanders

90.
MATTEL toys
Mattel

	media dollars	
	1979	1980
Magazines	$ 1,420,000	$ 1,521,000
Supps	—	214,000
Newspapers	—	722,000
Network tv	12,632,000	14,557,000
Spot tv	12,205,000	8,410,000
Network radio	—	—
Spot radio	—	12,000
Outdoor	—	—
Total	**$26,267,000**	**$25,436,000**

Classification: games (LNA G-450)
Marketing/brand management:
Vp-mktg. services, Pat Feely
Mgr. adv., Ellen Fitzpatrick
Agency: Ogilvy & Mather, Los Angeles
Vp of mktg. services, Irwin Davis
Media dir., Dianna Brannon
Assoc. media dirs., Betty Pampian, Kim Kohler, Chuck Bieber

91.
CADILLAC cars
General Motors

	media dollars	
	1979	1980
Magazines	$ 3,834,000	$ 3,886,000
Supps	95,000	101,000
Newspapers	10,862,000	9,621,000
Network tv	1,574.000	2,421,000
Spot tv	4,397,000	6,543,000
Network radio	1,016,000	—
Spot radio	1,872,000	2,367,000
Outdoor	—	198,000
Total	**$23,650,000**	**$25,137,000**

Classification: passenger cars (LNA T-110)
Marketing/brand management:
Mktg. dir., Gordon Horsburgh
Dir. mdsg., R. B. Welday
Asst. dir. mdsg., F. R. Cadicamo, W. J. Dean
Agency: D'Arcy-MacManus & Masius, Bloomfield Hills, Mich.
Sr. vp.-mgt. super., Alex Morton
Vp-acct. supr., Robert C. Reed
Assoc. media dir., Marty Choinski

92.
KOTEX
Kimberly-Clark

	media dollars	
	1979	1980
Magazines	$ 4,145,000	$ 8,997,000
Supps	86,000	104,000
Newspapers	118,000	95,000
Network tv	6,450,000	11,973,000
Spot tv	229,000	2,235,000
Network radio	781,000	1,391,000
Spot radio	203,000	277,000
Outdoor	—	—
Total	**$12,012,000**	**$25,072,000**

Classification: feminine hygiene products (LNA D-123)
Marketing/brand management:
Dir. media serv., Bob Meister
Vp-feminine care products, Gil Zins
Prod. mgrs., Randy Rudolph, John Cook, Steve Kalmanson
Agency: Ogilvy & Mather, New York
Sr. vp-assoc. med. dir., Wilma Epstein
Asst. med. dir., Ron Harrison
Med. planners, Steve McNally, Linda Goodman
Asst. med. planner, Judy Wong

93.
COORS beer
Adolph Coors Co

	media dollars	
	1979	1980
Magazines	$ 115,000	$ 142,000
Supps	—	23,000
Newspapers	343,000	626,000
Network tv	1,660,000	3,259,000
Spot tv	12,379,000	16,303,000
Network radio	—	—
Spot radio	2,688,000	3,198,000
Outdoor	532,000	1,187,000
Total	**$18,017,000**	**$24,738,000**

Classification: beer (LNA F-310)
Marketing/brand management:
Dir. mktg., Rob Klugman
Grp. brand mgr., Robert Serber
Brand mgr., Jeff Hastings
Agency: Ted Bates, New York
Sr. vp. exec. dir. media/prgms., Walter Reichel
Sr. vp. dir. radio & tv, Charlie Trubia
Exec. vp.-client serv., Randy Hackett
Vp. acct. dirs.: Steve McCloskey, Dan Logan
Vp. acct. suprs.: Betty Valdes, Peter Bates, Denis Glennon, Sharon Mosse
Media supr., Gay Sussman
Media dir., Tom Mullen

94.
HIGH POINT coffee
Procter & Gamble

	media dollars	
	1979	1980
Magazines	$ 43,000	$ 950,000
Supps	—	—
Newspapers	36,000	61,000
Network tv	8,403,000	17,537,000
Spot tv	3,776,000	5,828,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Total	**$12,258,000**	**$24,476,000**

Classification: coffee (LNA F-171)
The media group includes:
Dir. of media, Russ Condit
Media asst., Patricia Grant
Agency: Compton Advertising, New York
Exec. vp., Philip Voss
Med. dir., Garrett Vreeland

95.
IBM
International Business Machines

	media dollars	
	1979	1980
Magazines	$ 4,534,000	$ 6,828,000
Supps	46,000	154,000
Newspapers	1,718,000	722,000
Network tv	17,707,000	14,777,000
Spot tv	903,000	532,000
Network radio	775,000	371,000
Spot radio	863,000	1,040,000
Outdoor	21,000	3,000
Total	**$26,567,000**	**$24,427,000**

Classification: office machines (LNA B-310)
Marketing/brand management:
(IBM corporate)
Dir. adv., C. G. Francis

Mgr. corp. print, Charles Pankenier
Mgrs. corp. tv: S. D. Norris, P. F. Judice (office products div.)
Mgr. adv./prom. pgms., W. P. Barton
Pgm. mgr., adv. pgms., Warren Paul
(data processing div.)
Mgr. adv., Don Butters
(federal systems)
Mgr. adv., Bill Corey
(general systems)
Mgr. adv., D. Coker
(IBM world trade — A/FE)
Mgr. adv., I J. Seligsohn
Agencies: Conahay & Lyon, New York
(IBM corporate)
Vp-acct. supr., Pat Hennebry
Assoc. media dir., Conant Sawyer
Vp-media dir., Richard Berry
Media plnr., Steve Caputo
Doyle Dane Bernbach, New York
Mgmt. supr., Nancy Wiese (office products)
Geer, DuBois, New York
Vp-media dir., Alan Johnson
Vp. assoc. med. dir, Joy Sliwa
Vp, acct. supr., John V. Allen
Marsteller, New York
(IBM federal systems)
Vp mgt. supr., James W. Waechter
Vp-media dir., Joseph H. Newman
Compton, New York
(IBM office products)
Vp. acct. super, John Ammon
Acct. exec., Scott Jennings

96.

COVER GIRL cosmetics

Noxell

	media dollars	
	1979	1980
Magazines	$ 7,632,000	$ 6,659,000
Supps	—	—
Newspapers	—	—
Network tv	14,442,000	16,945,000
Spot tv	543,000	438,000
Network radio	—	—
Spot radio	15,000	—
Outdoor	—	—
Total	**$22,632,000**	**$24,042,000**

Classification: cosmetics (LNA D-110)
Marketing/brand management:
Vp, cosmetic products mktg., Francis J. Harrison
Grp. prod. mgr., Peter M. Group
Sr. prod. mgr., Marie T. Bowers
Sr. prod. mgr., E. Michael McNamara
Prod. mgr., E. Randy Floss, Nancy B. Phillips
New prods. mgr., Donald M. Farquharson
Asst. new prods. mgr., Steven J. Colnitis
Agency: SSC&B, New York
Sr. vp-mgmt., supr., F. Stone Roberts

97.

TRIUMPH cigarettes

Loews Corp.

	media dollars	
	1979	1980
Magazines	$ 4,428,000	$ 7,839,000
Supps	2,293,000	2,567,000
Newspapers	13,364,000	10,669,000
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	5,388,000	2,635,000
Total	**$25,473,000**	**$23,710,000**

Classification: Tobacco (LNA G-110)
Marketing/brand management
Brand mng., Patricia Lawrence
Adv. dir., Bill Sands
Outdoor buyer, Milt Zeisler
Agency: Dancer Fitzgerald Sample, New York
Acct. super., Don Bigda
Acct. execs., Reg Pierce, Judy Bradford
Med. dir., Ira Weinblatt

98.

BAYER aspirin

Sterling Drug

	media dollars	
	1979	1980
Magazines	$ 4,030,000	$ 3,467,000
Supps	—	189,000
Newspapers	—	25,000
Network tv	19,284,000	18,614,000
Spot tv	684,000	49,000
Network radio	1,049,000	1,173,000
Spot radio	25,000	2,000
Outdoor	—	—
Total	**$25,072,000**	**$23,519,000**

Classification: medicines (LNA D-210)
Marketing/brand management:
Vp. dir. mktg., Frederick M. Fox
Vp-dir. advt., James Alberts
Agency: SSC&B Inc. Advertising
Exec. vp., Kenneth Robbins
Sr. vp-mgmt. supr., Arthur A. Knaus
Sr. vp, new products, Richard Ellington
Vp-acct. supr., Thomas Perrotta
Acct. super., Ann Hughes
Sr. vp-media dir., Larry Lamattina
Vp-assoc. media dir., Phil Ganz
Asst. media dir., Thomas O'Brien, D. O'Donnell

99.

VICKS

Richardson-Merrell

	media dollars	
	1979	1980
Magazines	$ 128,000	$ 39,000
Supps	—	—
Newspapers	123,000	290,000
Network tv	16,939,000	19,123,000
Spot tv	3,862,000	4,009,000
Network radio	—	—
Spot radio	627,000	48,000
Outdoor	—	—
Total	**$21,679,000**	**$23,509,000**

Classification: medicines (LNA D-210)
Marketing/brand management:
(Health Care Division)
Mktg. dirs.: Wayne LoCurto, Steve Bryan, Dieter Weng
Mtkg. mgrs.: Dane Battiato, Bill Thomson
Media dir., Irwin Fleischer
Agencies: Benton & Bowles, New York
Acct. dir., Richard Hopple
Vp-assoc. media dir., Mike Samet
Young & Rubicam, New York
Mgmt. super., Robert Gleckler

100.

FRANKLIN MINT

Franklin Mint Corp.

	media dollars	
	1979	1980
Magazines	$ 8,474,000	$10,566,000
Supps	4,027,000	4,664,000
Newspapers	6,280,000	8,270,000
Network tv	—	—
Spot tv	10,000	3,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Total	**$18,791,000**	**$23,503,000**

Classification: miscellaneous (LNA G-560)
Marketing/brand management:
Exec. vp-U.S. mktg. div., C. Wickard
Vp-U.S. mktg., M. Breisblatt
Vp.-mktg. devel., M. Golding
Agency: (in-house)
Media dir., Howard R. Batton

101.
LINCOLN
Ford Motor

	media dollars 1979	media dollars 1980
Magazines	$ 2,089,000	$ 1,518,000
Supps	—	—
Newspapers	4,902,000	6,033,000
Network tv	2,811,000	9,536,000
Spot tv	2,918,000	4,891,000
Network radio	—	—
Spot radio	707,000	1,294,000
Outdoor	—	168,000
Total	**$13,427,000**	**$23,440,000**

Classification: passenger cars (LNA T-110)
Marketing/brand management: (Lincoln-Mercury div.)
Gen. mktg. mgr., Joseph E. Cappy
Adv. mgr., John B. Vanderzee
Agency: Young & Rubicam, Detroit
Vp-mgmt. supr., John Snaders
Vp-media dir., Ken Poole

102.
ARCO
Atlantic Richfield

	media dollars 1979	media dollars 1980
Magazines	$ 2,819,000	$ 3,912,000
Supps	7,000	227,000
Newspapers	968,000	1,423,000
Network tv	4,064,000	10,755,000
Spot tv	3,855,000	3,962,000
Network radio	—	—
Spot radio	1,773,000	3,087,000
Outdoor	5,000	6,000
Total	**$13,491,000**	**$23,372,000**

Marketing/brand management:
Adv. mng., Lewis Angelos
Mgr. adv. serv., Lawrence C. Bershon
Agency: Needham, Harper & Steers, Los Angeles
Account executive, Thomas G. Hall

103.
GALLO wines
E&J Gallo

	media dollars 1979	media dollars 1980
Magazines	$ 2,914,000	$ 4,025,000
Supps	114,000	126,000
Newspapers	223,000	345,000
Network tv	12,485,000	16,174,000
Spot tv	1,068,000	802,000
Network radio	—	—
Spot radio	55,000	691,000
Outdoor	—	1,061,000
Total	**$16,859,000**	**$23,224,000**

Classification: wine (LNA F-310)
Marketing/brand management:
Vp. mktg. serv., M. G. Boyd
Mktg. dir. (distilled spirits), Gerry Glasgow
Mktg. dir. (table wines), Allen Berger, David Mantel
Dir. of media, Sue McClelland
Spot buyer, Ernie Cronkite
Agency: Young & Rubicam West, Los Angeles
Vp-media dir., Don Foote
Assoc. media dir., Ann Horton

104.
BETTY CROCKER foods
General Mills

	media dollars 1979	media dollars 1980
Magazines	$ 5,386,000	$ 4,124,000
Supps	504,000	19,000
Newspapers	1,007,000	36,000
Network tv	24,790,000	14,226,000
Spot tv	2,172,000	3,610,000
Network radio	505,000	355,000
Spot radio	—	—
OUtdoor	—	—
Total	**$34,364,000**	**$22,370,000**

Classifications: cooking products (LNA F-110); prepared food (LNA F-120); vegetables (LNA F-143)
Marketing/brand mangement:
Media services dir., Hal Mitch
Vp-dir. of mktg. services, Fletcher C. Waller, Jr.
Adv. services dir., Robert J. Blake
Creative services dir., Jack Griffin
Agency: NH&S, Chicago
Vp-assoc. media dir., Robert Garrison
Media supr., Judy Fischer
Print buyer, Jan Bailey

105.
KOOL-AID soft drink
General Foods

	media dollars 1979	media dollars 1980
Magazines	$ 1,611,000	$ 591,000
Supps	4,000	—
Newspapers	30,000	151,000
Network tv	15,931,000	16,404,000
Spot tv	5,189,000	4,956,000
Network radio	497,000	—
Spot radio	234,000	152,000
Outdoor	—	—
Total	**$23,496,000**	**$22,254,000**

Classification: soft drinks (LNA F-220)
Marketing/brand management:
Grp. prod. mgr., James Kilts
The media group includes:
Dir. media serv., David Braun
Assoc. media dir., P. E. Kane
Agency: Grey, New York
Vp-mgmt. supr., Harvi Robinson
Assoc. media dir., Alec Gerster
Asst. media dirs.: Jack Jadick (kids), Mike Weiden (adults)

106.
TEXACO gasoline
Texaco

	media dollars 1979	media dollars 1980
Magazines	$ 2,198,000	$ 3,987,000
Supps	—	—
Newspapers	1,143,000	2,956,000
Network tv	8,984,000	11,631,000
Spot tv	1,715,000	1,789,000
Network radio	—	—
Spot radio	609,000	1,612,000
Outdoor	11,000	—
Total	**$14,660,000**	**$21,975,000**

Classifications: general promotion (LNA T-230); gasoline, oil (LNA T-210) (LNA T-230)
Marketing/brand management:
Gen. mgr.-adv. & sls. prom worldwide, John H. Childs
Mgr. corp. adv., M. Keenan
Mgr., mktg. & adv., Walter Molony
Asst. adv. mgr., Roger Strecker
Agency: B&B, New York
Sr. vp-mgmt. supr., Joseph Hannan
Vp-acct. supr., Richard Jennings
Vp-assoc. media dir., Rich Hamilton
Asst. media dir., Jim Vail
Media planners, Beth Tilney, Sabrina Ross

107.
CRISCO shortening
Procter & Gamble

	media dollars 1979	media dollars 1980
Magazines	$ 1,963,000	$ 2,634,000
Supps	—	—
Newspapers	40,000	128,000
Network tv	10,374,000	12,409,000
Spot tv	4,798,000	6,266,000
Network radio	—	—
Spot radio	—	49,000
Outdoor	—	—
Total	**$17,175,000**	**$21,486,000**

Classification: cooking products (LNA F-110)
The media group includes:
Dir. of media, Russ Condit
Media asst., Patricia Grant
Agency: Compton, New York
Media mgr., Carol Karasick
Assoc. media mgr., Pat O'Donnell
(Crisco solid)
Mgmt. super., Gene Bartley
Acct. super., Chris Nardi
Planner, Dorothy Gay
Media mgr., Bob Pape
(Crisco oil)
Mgmt. super., Stu Sharpe
Acct. super., Joe Levine
Assoc. media mgr., Ann Mazzini
Planner, Alison Cross

108.
GAINES pet foods
General Foods

	media dollars	
	1979	1980
Magazines	$ 5,198,000	$ 4,874,000
Supps	—	69,000
Newspapers	163,000	479,000
Network tv	12,760,000	12,117,000
Spot tv	7,182,000	3,738,000
Network radio	42,000	87,000
Outdoor	—	—
Total	**$25,345,000**	**$21,364,000**

Classification: pet supplies (LNA G-530)
Marketing/brand management:
Category mgr., Ray Viault
Dir. media serv., David Braun
Assoc. dir. med. serv., P. E. Kane
Agency: Y&R, New York
(Gainesburgers)
Vp. acct. super, Joe Goren
Acct. exec., Joe Tilli
Sr. vp-media grp. supr., George Sharpe
Media supr., Bill Collihan

109.
AQUA-FRESH toothpaste
Beecham

	media dollars	
	1979	1980
Magazines	$ 838,000	$ 1,162,000
Supps	121,000	—
Newspapers	187,000	—
Network tv	15,856,000	19,797,000
Spot tv	2,203,000	295,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Total	**$19,305,000**	**$21,254,000**

Classification: toothpaste (LNA D-120)
Marketing/brand management:
Vp. sls., Robert Lancester
Vp. mktg., L. Wilde
Dir. prom. dev., Marshall J. Johns (Pittsburgh)
Agency: Grey Advertising Inc., New York
Assoc. media dir., John Jacobs
Media plnr., Claire Davis

110.
DRISTAN cold remedies
American Home Products

	media dollars	
	1979	1980
Magazines	$ 467,000	$ 82,000
Supps	—	—
Newspapers	2,000	—
Network tv	18,399,000	17,419,000
Spot tv	4,782,000	3,374,000
Network radio	598,000	311,000
Spot radio	14,000	—
Outdoor	—	—
Total	**$24,262,000**	**$21,186,000**

Classification: medicines (LNA D-210)
Marketing/brand management:
Tablets/capsules
Group mgr., Ed Smith
Product mgr., Ron Miller
Nasal mist
Group mgr., Don Benjamin
Agencies: Wm. Esty (tablets)
Mgmt. supr., A. Albrecht
Rosenfeld, Sirowitz, Lawson
Acct. supers., Marsha Hirschman, Deborah Forman
Acct. super., Robin Ryan
Kornhauser & Calene -(nasal mist)
Mgmt. supr., J. Shapiro

111.
XEROX copiers
Xerox Corp.

	media dollars	
	1979	1980
Magazines	$ 6,662,000	$ 5,853,000
Supps	—	—
Newspapers	1,476,000	3,103,000
Network tv	4,864,000	11,465,000
Spot tv	1,018,000	568,000
Network radio	646,000	—
Spot radio	499,000	159,000
Outdoor	—	—
Total	**$15,165,000**	**$21,148,000**

Classification: office machines & equipment (LNA B-312)
Marketing/brand management:
Dir. corp. adv. and prom., Michael E. G. Kirby
Mgr., adv. oper., Joseph M. Cooper, Jr.
Agency: Needham, Harper & Steers, New York
Acct. supr., Sam Hershfield
Media dir., Page Thompson
Assoc. media dirs. Marianne Caponneto (corp./copiers), Jay Quinn (office products)

112.
U.S. ARMY
U.S. Army Recruiting Command

	media dollars	
	1979	1980
Magazines	5,581,000	$ 6,178,000
Supps	444,000	—
Newspapers	1,468,000	1,801,000
Network tv	7,108,000	9,141,000
Spot tv	—	—
Network radio	861,000	494,000
Spot rado	932,000	3,122,000
Outdoor	286,000	398,000
Total	**$16,680,000**	**$21,134,000**

Classification: U.S. Government (LNA B-160)
Marketing/brand management:
Dir. adv./sp., Col. William F. Graf
Media dir., Maj. Jim Simon
Agency: N. W. Ayer, New York
Sr. vp-mgmt. supr., Nelson van Sant
Assoc., media dir., Brian Hughes

113.
VIRGINIA SLIMS cigarettes
Philip Morris

	media dollars	
	1979	1980
Magazines	$ 9,302,000	$12,090,000
Supps	457,000	747,000
Newspapers	6,781,000	3,439,000
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	3,342,000	4,802,000
Total	**$19,882,000**	**$21,078,000**

Classification: cigarettes (LNA G-110)
Marketing/brand management:
Brand mng., Larry Wilson
Agency: Leo Burnett, Chicago
Acct. super., Paul Driggs

114.
RAGU sauce
Chesebrough-Pond's

	media dollars	
	1979	1980
Magazines	—	$ 608,000
Supps	—	—
Newspapers	$ 152,000	372,000
Network tv	11,908,000	16,804,000
Spot tv	1,221,000	3,209,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Total	**$13,281,000**	**$20,993,000**

Classification: condiments (F-116)

Marketing/brand management:
Vp-mktg., Charles Perrin
Grp. product mgr., E. Volkweir (Ragu)
Grp. prod. mgr., Mike Jeans (Adolph's, Pizz Quick Campion)
Grp. product mgr., William Wilde (new products)
Media dir., corp. adv., Joseph Campion

Agency: Waring & LaRosa, New York
Acct. execs., Genevieve Shore (spaghetti sauce); Joy Gramolini (new products); Louise Erdman (cooking sauce)
Media dir., Martin Norva

115.
ALLSTATE insurance
Sears Roebuck

	media dollars	
	1979	1980
Magazines	$ 1,159,000	$ 833,000
Supps	—	—
Newspapers	83,000	190,000
Network tv	15,642,000	17,739,000
Spot tv	2,006,000	730,000
Network radio	—	—
Spot radio	3,000	1,491,000
Outdoor	60,000	7,000
Total	**$18,953,000**	**$20,990,000**

Classification: fire, casualty, life and other insurance (B-220)

Marketing/brand management:
Adv. dir., John W. Dear
Adv. mgr., R. E. Gorman, Jr.
Adv. mgr. Terre A. Tuzzolino

Agency: Leo Burnett, Chicago
Mgmt. dir., Ron Sims
Acct. supr., Jack Woods
Acct. exec., Don Cummings
Assoc. media dir., Don Amos
Media supr., Kay Durkin

116.
L'eggs
(Consolidated Foods)
Hanes Corp.

	media dollars	
	1979	1980
Magazines	$ 1,619,000	$ 2,533,000
Supps	176,000	16,000
Newspapers	218,000	163,000
Network tv	12,313,000	15,354,000
Spot tv	909,000	331,000
Network radio	912,000	765,000
Spot radio	405,000	1,708,000
Outdoor	—	—
Total	**$16,752,000**	**$20,870,000**

Classification: hosiery (LNA A-160)
Vp. mktg., Walter Pilcher
Grp. prod. dirs.: Donald F. Folger, Terry Walts
Sr. prod. mgrs.: Scott Burcham, Barry Boyd
Agency: Dancer Fitzgerald Sample, New York
Assoc. media dir., Walter Tietz
Media supr., Joe Pena

117.
MILTON BRADLEY games
Milton Bradley Co.

	media dollars	
	1979	1980
Magazines	$ 817,000	$ 2,000
Supps	—	—
Newspapers	—	—
Network tv	775,000	7,061,000
Spot tv	25,052,000	13,645,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Total	**$26,664,000**	**$20,708,000**

Classification: games, toys (LNA G-450)
Marketing/brand management:
Dir. prod. mgmt., James Walsh
Agency: MB Communications (house agency)
Gen. mgr., John Payson
Vp-media serv., Edward Radding
Dir. of opers., George Merritt

118.
TRUE VALUE hardware stores
Cotter & Co.

	media dollars	
	1979	1980
Magazines	$ 1,950,000	$2,015,000
Supps	—	—
Newspapers	35,000	—
Network tv	2,360,000	2,360,000
Spot tv	8,490,000	10,608,000
Network radio	6,553,000	5,693,000
Spot radio	—	—
Outdoor	5,000	5,000
Total	**$19,394,000**	**$20,676,000**

Classification: Miscellaneous (retail) LNA G-608)
Marketing/brand management:
Sec. treas.-mdsg. mgr., Ed Lanctot
Agency: Christenson, Barclay & Shaw Inc. Chicago
Acct. exec., Jerry Christenson
Media dir., Teresa Miller

119.
CARTE BLANCHE/CITIBANK
Citicorp

	media dollars	
	1979	1980
Magazines	$2,247,000	$ 2,872,000
Supps	47,000	39,000
Newspapers	—	—
Network tv	—	12,337,000
Spot tv	2,904,000	5,278,000
Network radio	—	—
Spot radio	102,000	21,000
Outdoor	7,000	50,000
Total	**$5,307,000**	**$20,597,000**

Classification: Financial (LNA B-150)
Marketing/brand management:
(Citicorp)
Vp., dir. adv. & mktg. serv., Edward W. Dooley
Agencies: (Citibank) Doyle, Dane, Bernbach, New York
Vp., acct. super., Barbara Monte
(Carte Blanche) Della Femina, Los Angeles
Pres., Jim Travis

Sources include Leading National Advertisers (LNA), Broadcast Advertiser Reports (BAR), Media Records, Radio Expenditure Reports (RER). All of these organizations have data to offer in greater detail than presented here on the top 200 brands and others.

Top 200 Millionaire brands
— expenditures in 1979 and 1980
— media decision makers on brands

120.
WENDY'S restaurants
Wendy's International, Inc.

	media dollars	
	1979	1980
Magazines	—	—
Supps	—	—
Newspapers	—	—
Network tv	$ 8,866,000	$ 9,036,000
Spot tv	10,834,000	10,749,000
Network radio	—	—
Spot radio	100,000	239,000
Outdoor	449,000	531,000
Total	**$20,249,000**	**$20,555,000**

Classification: restaurants (LNA G-330)
Marketing/brand management:
Sr. vp-mktg., Darrough B. Diamond
Vp-mktg., William Welter
Dir. of advert., Tom Santo
Dir. mktg., serv., Dan Corrigan
Media plans mgr., Tom Lounds
Agency: Dancer Fitzgerald Sample, New York
Ira Weinblatt, Peter Regan, Sam Michaelson, Lou Dorkin

121.
NATURAL LIGHT BEER
Anheuser-Busch

	media dollars	
	1979	1980
Magazines	$ 1,043,000	$ 889,000
Supps	—	—
Newspapers	77,000	—
Network tv	14,737,000	19,793,000
Spot tv	878,000	1,208,000
Network radio	—	16,000
Spot radio	634,000	1,544,000
Outdoor	217,000	20,000
Total	**$17,586,000**	**$20,470,000**

Classification: beer (LNA F-310)
Marketing/brand management:
Brand prom. mgr., Tony Gillick
Agency: D'Arcy-MacManus & Masius, St. Louis
Acct. super., Bob Gulovses
Vp-media, Beth Seib

122.
BIRDS EYE foods
General Foods

	media dollars	
	1979	1980
Magazines	$ 7,180,100	$ 2,332,000
Supps	—	—
Newspapers	187,000	211,000
Network tv	10,053,000	13,191,000
Spot tv	7,465,000	4,542,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Total	**$24,885,000**	**$20,276,000**

Classifications: vegetables (LNA F-143); cooking products (LNA F-110); prepared foods (LNA F-120)
Marketing/brand management:
Mktg. mgr., Neil Kelly
Dir., med. serv., David Braun
Assoc. dir. med. serv., P. E. Kane
Agencies: Y&R, New York
Mgmt. supr., Ed Comisky
Acct. supr., Ken Robinson
Vp-media grp. supr., George Sharpe
Media suprs., Beth Rockwood
B&B, New York
Sr. vp-mgmt. supr., Dick Hopple
Vp-acct. supr., Stephan Gramps
Vp-assoc. media dir., Rick Rock

123.
COLGATE personal products
Colgate-Palmolive

	media dollars	
	1979	1980
Magazines	$ 2,361,000	$ 2,839,000
Supps	595,000	159,000
Newspapers	1,220,000	184,000
Network tv	18,778,000	14,531,000
Spot tv	767,000	2,449,000
Network radio	260,000	—
Spot radio	2,116,000	—
Outdoor	—	—
Total	**$26,097,000**	**$20,162,000**

Classification: personal hygiene (LNA D-120)
Marketing/brand management:
Vp. genl. mgr., A. C. Shepard
Vp. mktg., B. Spelling
Oral prod. mgr., D. L. Enfield
Dir. media, Harry Way
Media planning, George Hull, S. I. Freilich
Agency: Ted Bates, New York
Exec. vp., R. Pisani
Sr. vp., mgmt., rep., Geoff Clarkson
Vp. med., dir., John Potenzano
Media super., A. P. Duffy
Acc. Super., Ila Feld

124.
20TH CENTURY-FOX films
20th Century-Fox Film Corp.

	media dollars	
	1979	1980
Magazines	$ 1,350,000	$ 1,229,000
Supps	12,000	14,000
Newspapers	—	61,000
Network tv	12,387,000	12,005,000
Spot tv	5,881,000	6,181,000
Network radio	109,000	—
Spot radio	2,117,000	361,000
Outdoor	88,000	86,000
Total	**$21,944,000**	**$19,937,000**

Classification: motion pictures (LNA G-310)
Marketing/brand management:
Dir. media services, Amy Gruberg
Mgr. media & co-op Lorraine Cruz
Agency: JWT, Entertainment Div., Los Angeles/New York
Pres., Ronald K. Sherman
Los Angeles
Sr. vp., Larry Olshan
Vp. acct. supr., Dick Porter
Acct. rep., Patricia Lewis
Vp. media supr., Edie Gruber
New York
Vp. acct. supr., Ms. Reggie Morrison

125.
PABST beer
Pabst Brewing

	media dollars	
	1979	1980
Magazines	—	$ 1,427,000
Supps	—	—
Newspapers	$ 79,000	113,000
Network tv	7,966,000	4,528,000
Spot tv	8,719,000	8,710,000
Network radio	—	—
Spot radio	1,772,000	4,781,000
Outdoor	50,000	283,000
Total	**$18,586,000**	**$19,842,000**

Classification: beer (LNA F-310)
Marketing/brand management:
Exec. vp-mktg., John D. Reifenrath
Vp-sr. brand mgr., Pabst Blue Ribbon, Richard Ratcheson
Brand mgr., Pabst Extra Light, Red-White & Blue, Richard Papke
Media dir., N. P. Allerup
Brand mgr. Olde English 800, Andeker, Furstenburg, Thomas M. Gresk
Agencies, McCann-Erickson, New York
(Pabst Blue Ribbon)
Acct. dir., Bernie Cammarata
Vp-media grp. head, George Hayes
Sr. vp-dir. media plan., Vince Rafti
(Furstenburg)
Acct. super., Joseph J. Giordano
Ogilvy & Mather, San Francisco
(Pabst Extra Light)
Acct. exec., Jim Magill
(Olde English 800)
Acct. exec., Steve Sandborg
(Andeker, Red-White & Blue)
Acct. exec., Nick Carter
Vp-mgmt. super., John Randazzo

126.
EXXON gasoline
Exxon

	media dollars	
	1979	1980
Magazines	$ 2,639,000	$ 824,000
Supps	—	—
Newspapers	3,808,000	2,617,000
Network tv	4,449,000	9,891,000
Spot tv	3,284,000	4,711,000
Network radio	—	343,000
Spot radio	700,000	894,000
Outdoor	348,000	269,000
Total	$15,228,000	$19,549,000

Classifications: general promotion (LNA T-230); gasoline, oil (LNA T-210)
Marketing/brand management:
(Houston)
Adv. mgrs., R. C. Knowles (marketing, J. B. Davis (public affairs)
(New York)
Mgr. comm. programs, J. Kenneth Kansas
Agencies: McCann-Erickson, Houston
Exec. vp-mgmt. supr., J. G. Hetherly
Vp-mktg. dir., Jim Shelby
Vp-acct. supr., R. T. Brogam
McCaffrey & McCall, New York
(corporate)
Sr. vp-grp. acct. head, J B Collins
Vp-acct. suprs., Ralph Thomas, Sam Fertig
Sr. vp-media dir., Harris Lefkon

127.
LOWENBRAU beer
Philip Morris

	media dollars	
	1979	1980
Magazines	—	$ 18,000
Supps	—	—
Newspapers	$ 276,000	521,000
Network tv	$13,979,000	14,310,000
Spot tv	2,987,000	4,672,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	1,000
Total	$17,242,000	$19,522,000

Classification: (LNA F310)
Marketing/brand management:
Exec. vp., Lauren S. Williams
Vp-brand mgmt., William W. Catlin
Grp. prod. dir., Robert Toledo
Brand mgr., Jerry Schmutte
Agency: Backer & Spielvogel, New York
Sr. vp-mgmt. rep., Jeffrey Palmer
Med. dir., Jay Schoenfeld
Assoc. med. dir., Scott Butler
Media supr., Alain Zutler
Media planner, Nancy Ferber

128.
ALKA-SELTZER
A. G. Bayer (Miles Labs)

	media dollars	
	1979	1980
Magazines	$ 1,214,000	$ 524,000
Supps	—	—
Newspapers	22,000	—
Network tv	16,402,000	15,165,000
Spot tv	3,362,000	3,288,000
Network radio	1,487,000	—
Spot radio	328,000	10,000
Outdoor	1,444,000	515,000
Total	$24,259,000	$19,502,000

Classification: medicines (LNA D-210)
Marketing/brand management:
Vp. plan. & new bus. ventures, James F. Peil
Vp-mktg. services, Mitchell Streicker
Vp.-mktg., U.S. proprietary prods., Stephen M. Reim
Agency: Wells, Rich, Greene, New York
Sr. vp-dir., corp. med. dir., Bob Geis
Vp.-plan. serv. dir., Steven Zigler
Vp.-plan. grp. head, Mike Haggerty
Vp. mgmt. supr., Walter Holden
Media planner, Tom Weiss

129.
LYSOL disinfectants
Sterling Drug

	media dollars	
	1979	1980
Magazines	$ 1,935,000	$ 1,596,000
Supps	—	23,000
Newspapers	35,000	45,000
Network tv	18,819,000	16,008,000
Spot tv	542,000	902,000
Network radio	—	714,000
Spot radio	3,000	—
Outdoor	—	—
Total	$21,334,000	$19,288,000

Classifications: disinfectants (LNA H-242); cleaners (LNA H-430)
Marketing/brand management:
Vp-mktg., Leonard Suskin
Agency: SSC&B, New York
Vp-acct. suprs., Jay Press, Rich Griff
Vp-assoc. media dir., Phil Ganz

130.
SONY electronics
Sony Corp.

	media dollars	
	1979	1980
Magazines	$ 5,619,000	$ 7,692,000
Supps	154,000	374,000
Newspapers	2,031,000	3,112,000
Network tv	8,635,000	4,581,000
Spot tv	2,752,000	530,000
Network radio	1,097,000	1,497,000
Spot radio	319,000	1,449,000
Outdoor	3,000	12,000
Total	$20,610,000	$19,247,000

Classification: tv sets (LNA H-310)
Marketing/brand management:
Adv. mgr. (audio), Mitchell Deutseh
Adv. mgr. (video), Jeff Brooks
McCann-Erickson, New York
Mgmt. rep., Robert R[illegible]
Acct. supr., Michael [illegible]ursak
Acct. execs., David Ganz, Rick Sella

131.
PAMPERS diapers
Procter & Gamble

	media dollars	
	1979	1980
Magazines	$ 1,602,000	$ 1,138,000
Supps	—	—
Newspapers	531,000	183,000
Network tv	14,285,000	14,356,000
Spot tv	5,429,000	3,397,000
Network radio	—	—
Spot radio	106,000	13,000
Outdoor	—	—
Total	$21,953,000	$19,087,000

Classification: diapers (LNA A-121)
Marketing/brand management:
Adv. mgr., Chuck Lieppe
Brand mgr., Jeff Jones
Dir. of media, Russ Condit
Agency: Benton & Bowles, New York
Vp-assoc. media dir., Frank Henderson
Asst. media dir., Steve Farella
Acct. supr., Jim Hutchinson

132.
PLAYTEX bras, girdles
Esmark

	media dollars	
	1979	1980
Magazines	$ 1,127,000	$ 2,553,000
Supps	284,000	—
Newspapers	540,000	53,000
Network tv	15,858,000	15,022,000
Spot tv	2,103,000	1,450,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Total	**$19,922,000**	**$19,078,000**

Classifications: underwear (LNA A-120); hygiene (LNA D-123)
Marketing/brand management:
Dir. med. serv., George Montaigne
Agencies: Grey Advertising
Mgmt. suprs. Jeff Stein, Warren Fischer
Acct. exec., Carol Springston
Asst. media dir., Polly Allen
Rosenfeld, Sirowitz, Lawson
(hair care products)
Exec. vp., Peter Heinz
Vp.-med. dir., Robert Hinson
Acct. exec., Don Kurn
Acct. super., Robin Fry
Asst. med. dir., Paula Senft
Planner, Gary Rothlein
Ogilvy & Mather, New York
Mgmt. supr., Paul Rabstein
Acct. supr., Sandra Ogrean
Sr. vp-assoc. med., dir., Tony Nacinovich
Vp-asst. med. dir., Alan Orlick

133.
MINOLTA cameras/copiers
Minolta Corp.

	media dollars	
	1979	1980
Magazines	$ 4,230,000	$ 5,474,000
Supps	—	70,000
Newspapers	57,000	1,270,000
Net tv	8,526,000	6,381,000
Spot tv	4,214,000	5,440,000
Net radio	—	—
Spot radio	29,000	417,000
Outdoor	—	—
Total	**$17,056,000**	**$19,052,000**

Classification: cameras (LNA G-230); office machines (LNA B-312)
Marketing/brand managment:
(Cameras)
Dir. comm. & p.r., Harold Center
(office machines)
mkt. develop. mgr., Bob Parks
Agency: Bozell & Jacobs, New York
Sr. vp., Albert Shaprio
Acct. supr./pr., Richard Sammon
Acct. supr., Gerald Matthes
Acct. execs., Stephen Block, Kathy Day, Bob Byer
Sr. vp. med. dir., Joel Kashins
Media mgr., Harry Glass
Vp. assoc. med. dir., Carol Libby

134.
GOODYEAR tires
Goodyear

	media dollars	
	1979	1980
Magazines	$ 2,199,000	$ 2,718,000
Supps	—	—
Newspapers	—	—
Network tv	16,771,000	10,234,000
Spot tv	927,000	5,414,000
Network radio	278,000	354,000
Spot radio	97,000	10,000
Outdoor	180,000	217,000
Total	**$20,458,000**	**$18,947,000**

Classification: tires and tubes (LNA T-140)
Marketing/brand mangement:
Vp-adv., John P. Kelley
Dir. adv., George S. Lenox
Mgr. adv. media services, George S. Drop
Agencies: Campbell-Ewald, New York
(Tire division)
Exec. vp., Donald J. Bratrude
Sr. vp-mgmt. supr., Peter Kennaby
Exec. vp-media dir., Thomas J. Glynn
Vp-Acct. supr., Glenn Marrichi

135.
BUSCH
Anheuser-Busch

	media dollars	
	1979	1980
Magazines	$ 860,000	$ 102,000
Supps	97,000	—
Newspapers	625,000	93,000
Network tv	—	—
Spot tv	9,403,000	14,067,000
Network radio	—	—
Spot radio	7,920,000	4,367,000
Outdoor	1,180,000	211,000
Total	**$20,085,000**	**$18,840,000**

Classification: beer (LNA F-310)
Marketing/brand management:
Vp-mktg., Michael J. Roarty
Vp.-brand mgmt., Jack MacDonough
Mktg. mgr., Davis L. Morris
Sr. brand mgr., Michael C. Palmer
Brand prom. mgr., William E. Braun
Agency: Needham, Harper & Steers, Chicago
Mngmt., Rep., Ron Bess
Acct. supr., Ray Gillette
Assoc. media dir., Tom McAlevey
Media supr., Dave Wurfel

136.
CAMPBELL's foods
Campbell Soup

	media dollars	
	1979	1980
Magazines	$ 4,053,000	$ 5,340,000
Supps	295,000	178,000
Newspapers	1,415,000	592,000
Network tv	11,320,000	6,464,000
Spot tv	1,615,000	3,235,000
Network radio	1,363,000	2,020,000
Spot radio	838,000	831,000
Outdoor	215,000	24,000
Total	**$21,174,000**	**$18,684,000**

Classification: prepared foods (LNA F-120)
Marketing/brand management:
Dir. adv. services, Robert Bolte
Dir. prom., Frank A. Dudowicz
Mgr. media services, Mary Anne Ham
Mgr. media execution, Chris Miller
Agencies: BBDO, New York
Asst. med. dirs., Mark Bufitta (Soup for One); Bruno Crea (Chunky)
Vp. media dir., Alan Goldin
Vp. assoc. media dir., Jane Fuller
Needham, Harper & Steers, New York
Sr. vp-acct. grp. dir., Phil Wallace
Vp-acct. supr., Jan Ponchalek
Vp-media mgr., Bernie Newman
Media supr., Ken Bielicki

137.
CLOROX laundry products
Clorox

	media dollars	
	1979	1980
Magazines	$ 744,000	$ 170,000
Supps	—	14,000
Newspapers	—	—
Network tv	15,536,000	17,515,000
Spot tv	332,000	912,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Total	**$16,612,000**	**$18,611,000**

Classification: laundry preparations
Marketing/brand management:
Adv. mgr., Michael R. Gallagher
Mgr. media, Patt Korr-Roschke
Agency: FC&B/Honig, San Francisco
Vp. mgmt. surp., Jack Balousek
Sr. vp. dir. media, Ted Block
Vp. assoc. media dir., Jean Hazetton
Media supr., Robin Harper
Acct. suprs.: Tom McKean (Clorox 2); David Schaefer (Clorox liquid)

138.
KENNER toys
General Mills

	media dollars	
	1979	1980
Magazines	$ 834,000	$ 592,000
Supps	—	—
Newspapers	—	706,000
Network tv	14,550,000	11,066,000
Spot tv	9,905,000	6,165,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Total	**$25,289,000**	**$18,529,000**

Classification: games (LNA G-450)
Marketing/brand management:
Vp-adv./mktg. services, Hugh Keiser
Dir. adv. cons. proms., Ellen Moser
Agencies: Sive, Cincinnati
Vp-media dir., Marcia Cann
Acct. supr., John MacDonald
Asst. media dir., James C. Rice
Grey, New York
Sr. vp-mgmt. rep., Lou Malouf
Vp-assoc. media dir., Robert Giacomino
Asst. media dir., Chessye Hill
Asst. group head, Wendy Flickinger
Media plnr., Katie Weil

139.
TEXIZE
Morton-Norwich

	media dollars	
	1979	1980
Magazines	$ 398,000	$ 488,000
Supps	—	—
Newspapers	1,227,000	1,433,000
Network tv	11,493,000	14,879,000
Spot tv	2,559,000	480,000
Network radio	556,000	1,166,000
Spot radio	4,000	—
Outdoor	45,000	—
Total	**$17,227,000**	**$18,446,000**

Classification: cleaners (LNA H-431)
Marketing/brand management:
Vp. mktg., George Mercer
Sr. vp.-mktg., Doug West
Agencies: Henderson Adv., Greenville, S.C.
Exec. vp-dir. acct. serv., Ralph W. Callahan, Jr.
Vp. mgmt. super., David Strauss, Lloyd Fritzmeier, Howard Clark
Sr. vp. media Dir., Bob Reuschle
Vp-assoc. media directors, Polly Goodrich-Reese, Sally Luttrell
Liller Neal Weltin, Atlanta (Grease Relief, Yes, Wood Plus, and new products)
Sr. vp, Richard Hemsley
Sr. vp-med. dir., Everett Nelson
Assoc. med. dir., Val Ritter
Med. super., Pat Condo
Benton & Bowles, New York
Vp. assoc. media dir., Frank Massaro

140.
MOBIL gasoline/oil
Mobil Oil

	media dollars	
	1979	1980
Magazines	$ 3,126,000	$ 2,387,000
Supps	1,797,000	2,161,000
Newspapers	5,619,000	5,631,000
Network tv	—	1,770,000
Spot tv	5,514,000	4,124,000
Network radio	—	—
Spot radio	1,825,000	2,266,000
Outdoor	67,000	53,000
Total	**$17,948,000**	**$18,392,000**

Classification: general promotion (LNA T-230), gas/oil (LNA T-211)
Marketing/brand management:
(U.S. Marketing and Refining Div.)
Vp-gen. mgr. mktg., R. L. Abbott
Gen. mgr. mktg. serv., K. C. Esty
Adv. mgr., J. P. Landy
Mgr. cmcl. adv., Isaac Kershaw
Resale mgr., D. P. Spada
(public affairs div.)
Vp-public affairs, Herbert Schmertz
Gen. mgr. pub. rel., R. P. Maxon
Agencies: Doyle Dane Bernbach
Grp. Sr. vp., Alan Pando
Vp-acct. mgmt. supr., L. Iannuzzelli
Acct. exec. John White
Acct. supr., Brian Craig
Asst. acct. exec., B. Best
Dir. media services, Sy Goldis
Media plng. dir., Emil Tacovsky
Assoc. planning dir., Stan Grayson
Creamer, New York (Industrial)
Acct. supr., Fred Dixon
Assoc. med. dir., Bob Kutsche
Creamer, Chicago (Industrial)
Acct. supr., Ron Hortzman
Sr. media planner/buyer, Elaine Schroeder

141.
SAFEWAY stores
Safeway Food

	media dollars	
	1979	1980
Magazines	—	$ 25,000
Supps	—	—
Newspapers	(no data)	(no data)
Network tv	—	219,000
Spot tv	$17,854,000	16,999,000
Network radio	—	—
Spot radio	723,000	999,000
Outdoor	—	49,000
Total	**$18,709,000**	**$18,291,000**

Classification: general promotion (LNA F-180)
Marketing/brand management:
Vp-adv./res. div., Gerald E. Brown
Mgr. adv. dept., Ron Giglio
Agency: no national agency — each advertising manager in each of 21 retail divisions determines media expenditures for respective division.

142.
TRUE cigarettes
Lorillard Div., Loews

	media dollars	
	1979	1980
Magazines	$ 6,070,000	$ 5,593,000
Supps	1,688,000	1,891,000
Newspapers	6,996,000	6,295,000
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	3,499,000	4,491,000
Total	**$18,253,000**	**$18,270,000**

Classification: tobacco (LNA G-110)
Marketing/brand management: Exec. vp-mktg., J. Robert Ave
Vp-adv., Tom Mau
Grp. brand dir., George Telford
Media dir., Bill Sands
Mgr. In-home media, Steve Molloy
Mgr. out-of-home, Lucy Puccio
Agency: D'Arcy McManus & Masius
Sr. vp-exec. dir. media, George S. Karalekas
Vp-assoc. media dir., John F. Roth
Media supr., Richard Gearhart
Media planner, Andrea Furman
Exec. vp, Robert Berman

Mgmt. supr., Steven Seiter
Acct. supr., Fred Jacobs
Acct. exec., Lynn Shunk

143.
PIZZA HUT
PepsiCo

	media dollars 1979	media dollars 1980
Magazines	$ 10,000	$ 4,000
Supps	—	5,000
Newspapers	—	—
Network tv	10,364,000	12,080,000
Spot tv	3,510,000	5,593,000
Network radio	—	—
Spot radio	468,000	535,000
Outdoor	59,000	45,000
Total	**$14,411,000**	**$18,262,000**

Classification: restaurants (LNA G-330)
Marketing/brand management:
Vp-mktg., Bud Gates
Vp-adv., William H. Tyler
Dir. of Adv., Tony Aldana
Agency: Foote, Cone & Belding, Chicago
(Network & spot media bought through 26 local agencies)
Grp. mgmt. supr., Paul Vernon
Acct. supr., Terri Shapiro
Acct. execs.: Mark Modesto
Asst. acct. exec., Mark Pacchini
Media supr., Bruce Smith
Grp. media dir., Fred Wray

144.
LUV's diapers
Procter & Gamble

	media dollars 1979	media dollars 1980
Magazines	$ 699,000	$ 1,536,000
Supps	—	—
Newspapers	128,000	11,000
Network tv	—	477,000
Spot tv	7,345,000	16,238,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Total	**$8,172,000**	**$18,262,000**

Classification: underwear (LNA A-121)
Marketing/brand management:
Brand mngr., Steve Price
Dir. of media, Russ Condit
Media super., Jack Taylor
Agency: Dancer Fitzgerald Sample, New York
Acct. super., Doug Harding
Sen. assoc. med. dir., Richard Weigand
Assoc. med. dir., Estrea Dworkin
Med. super., Jeff Gouverneur
Planner, Stephanie Oberst

145.
QUAKER foods
Quaker Oats Co.

	media dollars 1979	media dollars 1980
Magazines	$ 2,976,000	$ 2,023,000
Supps	125,000	49,000
Newspapers	141,000	83,000
Network tv	10,212,000	14,075,000
Spot tv	4,245,000	2,057,000
Network radio	—	—
Spot radio	174,000	28,000
Outdoor	5,000	—
Total	**$17,878,000**	**$18,215,000**

Classification: cereals (LNA F-120), cookies (LNA F-113)
Marketing/brand management:
Media dir., (Quaker Oats) Bill Brown
Vp. mkt., pet foods, Jimmy Kauffman
Dir. mkt., frozen foods, Cynthia Vacin
Vp/mkt., foods, Douglas Mills
Agency: Adcom, Inc., Chicago (cereals)
Vp/dir. of media, Joan G. Stark
Bozell & Jacobs, Inc., Dallas (ritz snacks)
Vp/Acct. supr., Mike Gallant
Assoc. med. dir., Sandy Weisberger
BBDO, New York (cereals)
Med. plan. grp. head, John Belfiore
JWT, Chicago (Ken-L-Ration, Aunt Jemima)
Assoc. med. dir., Shari Wall

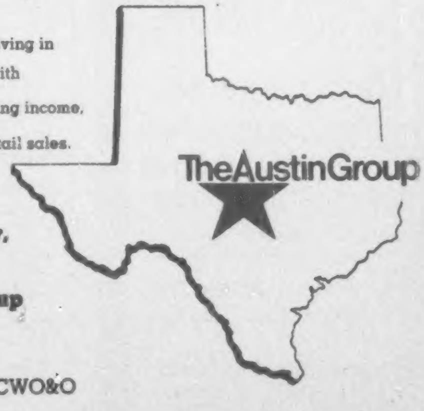
146.
RED LOBSTER inns
General Mills

	media dollars 1979	media dollars 1980
Magazines	$ 3,000	—
Supps	—	—
Newspapers	—	—
Network tv	178,000	—
Spot tv	12,880,000	17,162,000
Network radio	—	—
Spot radio	843,000	669,000
Outdoor	53,000	51,000
Total	**$13,957,000**	**$17,882,000**

Classification: restaurants (LNA G-330)

Over one quarter of a million circulation right where you want it.

Over **2 million** Texans living in
¾ million homes with
almost **$13 billion** in buying income,
and spending **$8.7 million** on retail sales.



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SOURCE: ABC Publishers' Statements, 9/30/80
1980 S&MM Survey of Buying Power

Austin American-Statesman, Austin, Texas
Waco Tribune-Herald, Waco, Texas
Port Arthur News, Port Arthur, Texas
Longview News Journal, Longview, Texas
Lufkin News, Lufkin, Texas
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7.0% UNITED STATES
April '81 Employment Security Commission

The News and Observer
THE RALEIGH TIMES
•
Durham Morning Herald
The DURHAM SUN

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Marketing/brand management:
Dir. mkgt., John Waters
Adv. mgr., Barbara Wells
Adv., super., Bill Lang
Nat'l field mkgt. mgr., Dick Monroe
Agency: D'Arcy — MacManus & Masius, St. Louis
Sr. vp-mgmt. supr., Chuck Grady
Vp. Acct. supr., Gerry Hart
Acct. execs., Terry Lucas, Jim Palumbo, John Poggendorf
Vp. grp. med. dir., Jim Porcarelli

147.
VICEROY
BAT Industries

	media dollars 1979	media dollars 1980
Magazines	$10,300,000	$ 5,771,000
Supps	93,000	1,371,000
Newspapers	1,388,000	4,043,000
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	6,101,000	6,663,000
Total	**$17,882,000**	**$17,848,000**

Classification: cigarettes (LNA G-111)
Marketing/brand management:
Vp-mktg., Scott Wallace
Media dir., Tom Neville
Agency: McCann-Erickson Inc.
Acct. exec., David Ganz
Med. grp. head, Jim Lan[illegible]nd

148.
SHELL
Shell Oil

	media dollars 1979	media dollars 1980
Magazines	$ 5,179,000	$ 5,052,000
Supps	—	—
Newspapers	388,000	184,000
Network tv	13,417,000	7,689,000
Spot tv	—	—
Network radio	4,464,000	—
Spot radio	738,000	289,000
Outdoor	26,000	55,000
Total	**$23,427,000**	**$17,743,000**

Classifications: general promotion (LNA T-230); pest controls (LNA T-550); gasoline, oil (LNA T-210)
Marketing/brand management:
Dir. adv./prom., John H. Haines
Mgr. comm., John Quinn
Agency: Ogilvy & Mather, Houston
Vp, mgmt. supr., James Hine
Vp, media dir., Ron Reilly

149.
DIAL soap
Greyhound Corp.

	media dollars 1979	media dollars 1980
Magazines	$ 428,000	$ 1,101,000
Supps	—	—
Newspapers	—	13,000
Network tv	11,714,000	14,790,000
Spot tv	162,000	12,000
Network radio	1,820,000	1,778,000
Spot radio	—	—
Outdoor	—	—
Total	**$14,124,000**	**$17,694,000**

Classification: soaps (LNA D-122)
Marketing/brand management:
Adv. dir., Denton Cruse
Agency: Needham, Harper & Steers
Vp. acct. dir., Don Dempsey
Acct. excec., Mary Bell
Vp.-assoc. med. dir., Glenn Erdell

150.
BRIM coffee
General Foods

	media dollars 1979	media dollars 1980
Magazines	$ 1,664,000	$ 1,374,000
Supps	366,000	583,000
Newspapers	1,153,000	858,000
Network tv	6,259,000	10,318,000
Spot tv	4,303,000	4,312,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Total	**$13,745,000**	**$17,445,000**

Classification: coffee (LNA F-171)
Marketing/brand management:
Sr. prod. mgr., Nancy Wong
Assoc. prod. mgr., Leslie Sirlin
Asst. prod. mgr., Eileen Serra
Agency: Benton & Bowles, New York
Acct. super., Ted Donahue

151.
BLACK & DECKER
Black & Decker

	media dollars 1979	media dollars 1980
Magazines	$ 340,000	$ 1,127,000
Supps	7,000	246,000
Newspapers	—	739,000
Network tv	7,900,000	8,912,000
Spot tv	1,108,000	5,306,000
Network radio	—	—
Spot radio	125,000	—
Outdoor	—	2,000
Total	**$9,480,000**	**$17,332,000**

Classification: power tools, appliances, furniture (LNA H-215, H-120, H-524)
Marketing/brand management
John Butl[illegible] ad. mgr., construction prods.
George Strohecker, ad. mgr., automotive
Agency: BBDO, New York
acct. super., accessories, Bob Jackson
acct. super., power tools, Dave Sear
Med. dir., Joan Sheridan

152.

ZENITH

Zenith Radio

	media dollars 1979	1980
Magazines	$ 3,735,000	$ 3,678,000
Supps	—	—
Newspapers	2,486,000	1,633,000
Network tv	8,527,000	8,085,000
Spot tv	3,955,000	3,774,000
Network radio	—	—
Spot radio	—	—
Outdoor	45,000	149,000
Total	**$18,748,000**	**$17,319,000**

Classification: radios, tv sets (LNA H-310)
Marketing/brand management:
Vp-mktg. John L. McCallister
Dir. adv./s.p., Joseph J. Ptacin
Agency: FC&B, Chicago
Mgmt. supr., John Giroux
Grp. media dir., Fred Wray
Media supr., Bruce Smith

153.

TIDE detergent

Procter & Gamble

	media dollars 1979	1980
Magazines	$ 2,958,000	$ 2,327,000
Supps	—	—
Newspapers	33,000	95,000
Network tv	10,886,000	11,343,000
Spot tv	4,035,000	3,505,000
Network radio	—	—
Spot radio	—	42,000
Outdoor	—	—
Total	**$17,912,000**	**$17,312,000**

Classification: soaps (LNA H-410)
Marketing/brand management:
Brand mgr., Tom Moore
The media group includes:
Dir. of media, Russ Condit
Media asst., Patrica Grant
Agency: Compton, New York
Mgmt. super., Stu Sharpe

In Syracuse, 21% of Prime Time Adults are watching Cable TV

According to a newly released study of television viewers in all time slots, 21% of the adult prime time audience in a major metropolitan market are switching to Cable TV every night. This and dozens of other eye-opening facts are contained in 2 new brochures "The Effect of Cable TV In A Major Metropolitan Market©," and Syracuse Newspaper Readership.

Source: Belden CMS 1980

The Effect of Cable TV In A Major Metropolitan Market

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The Advocate

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As you can see from the chart below, over half of those who shop in Fairfield read a Fairfield County Daily Newspaper, (FCD) while only 17.7% read the New York Daily News and 19.8% read the New York Times.

With a daily circulation of 158,330, the FCD Newspapers reach 55.4% of the "Do More – Shop More" suburban Connecticut households. The Daily News only reaches 10.6% and the Times only 12.2%.

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55.1%	17.7%	19.8%

FCD

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Title ____
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Company ____
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City ____
State ____ Zip ____
MMD781

Acct. super., Jean Mojo
Sr. vp-media dir., Dawn Sibley
Media mgr., John Ryan
Asst. media mgr., Laura Tyson

154.
EXCEDRIN analgesic
Bristol-Myers

	media dollars 1979	1980
Magazines	$ 831,000	$ 833,000
Supps	—	—
Newspapers	—	—
Network tv	13,201,000	14,478,000
Spot tv	1,863,000	1,951,000
Network radio	—	—
Spot radio	64,000	35,000
Outdoor	—	—
Total	$15,959,000	$17,297,000

Classification: medicine (LNA D-210)
Marketing/brand management:
Dir. adv. service, Robert Turner
Dir. Boclaro, Santo Critelli
Media plnr., Samuel Hill
Vp mktg., Nick Cannistraro
Grp. prod. mgr., Jim Jackson
Prod. mgr., Todd Middleton
Agency: Boclaro Inc. (in house)
(Agency for creative services is Kenyon & Eckhardt.)

155.
MIDAS auto supplies
IC Industries

	media dollars 1979	1980
Magazines	$ 8,000	—
Supps	—	—
Newspapers	—	—
Network tv	7,490,000	$ 8,463,000
Spot tv	5,105,000	5,786,000
Network radio	—	—
Spot radio	2,581,000	2,939,000
Outdoor	16,000	18,000
Total	$15,208,000	$17,206,000

Classification: auto parts & accessories (LNA T-154)
Marketing/brand management:
Vp.-adv., Chuck Graziano
Agency: Wells, Rich, Greene, New York
Exec. vp-gen. mgr., Larry Singer
Vp.-mgmt. super, Steve Keenan
Vp.-acct. super., Bob Swann
Vp.-med. dir., Bob Olsen
Assoc. med. dir., Mary Ellen Stevens

156.
MINUTE MAID
Coca-Cola Co.

	media dollars 1979	1980
Magazines	$ 1,476,000	$ 1,527,000
Supps	123,000	26,000
Newspapers	733,000	759,000
Network tv	9,856,000	11,710,000
Spot tv	2,070,000	1,733,000
Network radio	—	1,441,000
Spot radio	240,000	—
Outdoor	—	—
Total	$14,498,000	$17,196,000

Classification: Fruit juices (LNA F-172)
Market/brand management:
Ex. vp. mark. mgr., E. V. Amoroso
Vp-mark. planning, A. G. Munkelt
Market. manager (frozen juices), M.P. Youngjohn
Market. manager (refrigerated products), H.S. Robinson
Market. manager (dry grocery products), F. E. Bloo
Market. serv. manager, D.A. Sauer
Agency: Marschalk, New York
Exec. vp.-media dir., Art Wilen
Dir. media plan., Rodger White

157.
DUNCAN HINES mixes
Procter & Gamble

	media dollars 1979	1980
Magazines	$ 1,613,000	$ 2,628,000
Supps	332,000	—
Newspapers	—	—
Network tv	8,552,000	12,579,000
Spot tv	2,145,000	1,909,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Total	$12,642,000	$17,116,000

Classification: baking mixes (LNA F-113)
Marketing/brand management:
Brand mgr., Mitch Wienick
The media group includes:
Dir. of media, Russ Condit
Media asst., Patricia Grant
Agency: Compton, New York
Mgmt. super., Tom Lom
Acct. super., Chris Nardi
Media mgr., Nancy Fastenberg
Asst. media mgr., Mary Ann Power
Media planners, Beth Fredericks, Pat Darcy

158.
PHILLIPS gas & oil
Phillips Petroleum Co.

	media dollars 1979	media dollars 1980
Magazines	$ 1,754,000	$ 2,285,000
Supps	—	—
Newspapers	51,000	51,000
Network tv	8,330,000	8,630,000
Spot tv	1,463,000	1,099,000
Network radio	2,232,000	3,280,000
Spot radio	1,196,000	1,681,000
Outdoor	6,000	14,000
Total	**$15,032,000**	**$17,040,000**

Classification: gasoline, oil (LNA T-210)

Marketing/brand management:
Media dir., Jim Daniels
Adv. mgr., P.R. Cleek

Agency: Tracy-Locke Adv. & Pub. Rel., Dallas
Mgmt. sup., Dick Craiglo
Acct. supr., Tom Morris
Assoc. media dir., Phil Ganz
Media supr., Tom Morrison
Dir. net tv, Gina Burks

159.
K-TEL
K-Tel International

	media dollars 1979	media dollars 1980
Magazines	—	—
Supps	—	—
Newspapers	—	—
Network tv	1,100,000	1,285,000
Spot tv	10,969,000	11,185,000
Network radio	—	—
Spot radio	3,317,000	4,554,000
Outdoor	—	—
Total	**$15,386,000**	**$17,024,000**

Classifications: records, tapes (LNA H-330); books, music (LNA B-410)

Marketing/brand management:
Exec. vp, Mickey Elfenbein
Vp-gmgr., David Catlin
Nat'. sales mgr., Bill McMahon

Agency: Commonwealth Adv., Minnetonka, Minn. (in-house)
Vp-adv./gl. mgr., Ron Vander Kelen
Reg. media dirs., Patrica Borg, Jon Bird, Sally Siewert, Debra Roue

160.
TV GUIDE
Triangle

	media dollars 1979	media dollars 1980
Magazines	$ 658,000	$ 653,000
Supps	—	—
Newspapers	765,000	672,000
Network tv	—	—
Spot tv	17,466,000	15,755,000
Network radio	—	—
Spot radio	—	27,000
Outdoor	—	3,000
Total	**$18,889,000**	**$17,110,000**

Classification: magazines (LNA B-420)

Marketing/brand management:
Adv. dir., Eric Larson
Adv. prom. mgr., Arthur Brener

Agency: N. W. Ayer, New York
Exec. vp, Al Wolfe
Vp-acct. supr., George Malcomson
Sr. vp-media dir., Marcella Rosen
Vp-assoc. media dir., Brian Hughes

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1

And, the numbers are remarkable!

The Audit Bureau of Circulations Publishers' Statements
for the six months ended March 31, 1981, show the
News weekday circulation
leading the Post in the Denver City Zone by
21,888
leading the Post in the Denver-Boulder SMSA by
15,675
and leading the Post in total circulation by
12,021
Remarkable numbers. Remarkable newspaper.
Source: Audit Bureau of Circulations March 31, 1981. Publisher's Statements both newspapers.

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KELO-LAND TV
racks up a barrel of Number Ones in nationwide Arbitron Sweeps

#1	ADI	S/O-S/O	Persons 18-49	43 share
#1	ADI	S/O-S/O	Total Households	46 share
#1	ADI	Early Fringe	Women 18-49	50 share (TIE)
#1	ADI	Early Fringe	Total Households	47 share
#1	ADI	Prime Time	Persons 18-49	44 share
#1	ADI	Prime Time	Total Homes	47 share
#1	ADI	Prime Access	Persons 18-49	50 share
#1	TSA	S/O-S/O	Women (18-49)	55 share
#1	TSA	S/O-S/O	Men (18-49)	53 share

A CBS AFFILIATE

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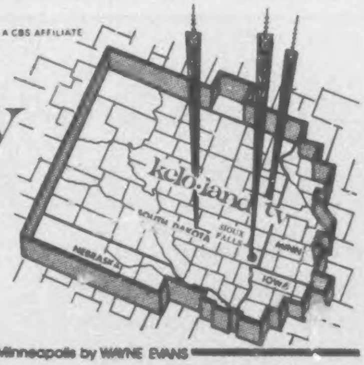
and satellites KDLO-tv, KPLO-tv

Source: Arbitron Sweeps, Nov. '80. Affiliates of all three networks in equal facilities markets. Survey data estimates subject to usual qualifications.



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TOP TEN NEW ENGLAND NEWSPAPERS
5 YEAR GROWTH/DECLINE IN TOTAL CIRCULATION

Hartford Courant	+17.7%	Providence Journal/Bulletin	+ 2.6%
BANGOR DAILY NEWS	+ 7.1%	Worcester Telegram/Gazette	+ 1.3%
Boston Globe	+ 7.0%	Portland Press Herald/Express	+ 1.2%
New Haven Register	+ 6.2%	Springfield Union News	— 3.0%
Bridgeport Post/Telegram	+ 3.7%	Boston Herald American	—11.4%

Bangor Daily News
On top of New England.

161.
DR PEPPER soft drink
Dr Pepper

	media dollars 1979	1980
Magazines	—	—
Supps	—	—
Newspapers	$ 438,000	$ 531,000
Network tv	4,915,000	6,932,000
Spot tv	7,048,000	7,606,000
Network radio	—	—
Spot radio	1,315,000	1,664,000
Outdoor	479,000	277,000
Total	$14,195,000	$17,010,000

Classification: soft drinks (LNA F-220)
Marketing/brand management:
Vp-mktg. ser., Charles L. Hawkins
Natl. a.m., William L. Schermerhorn
Agencies: Y&R, New York
Sr. vp-grp. dir., Bill Thompson
Vp-mgmt. supr., Ed Comiskey
Acct. supr., Bob Hamlin
Vp-media grp. supr., Ira Tumpowsky
Media supr., Don Davis
Eagle Advertising (In-house)
Med. mng., Brenda Warst

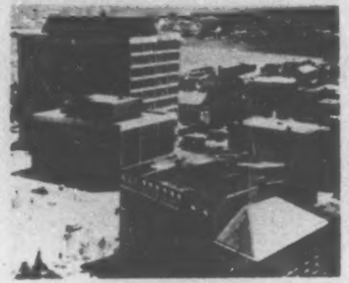
162.
JOHNSON'S products
S. C. Johnson

	media dollars 1979	1980
Magazines	$ 3,812,000	$ 4,046,000
Supps	189,000	538,000
Newspapers	517,000	56,000
Network tv	8,794,000	10,888,000
Spot tv	717,000	1,458,000
Network radio	—	—
Spot radio	275,000	—
Outdoor	—	—
Total	$14,304,000	$16,986,000

Classifications: cleaners (LNA H-430); laundry preparations (LNA H-420); deodorizers (LNA H-243)
Marketing/brand management:
Vp-mktg., J. F. Keane
Dr. adv. services, August Priemer
Grp. prod. mgrs.: J. D. Culea (floor & laundry care); T. L. Dahl (seasonal prods.); G. L. Konarske (air fresheners); W. J. Walley (personal care); B. M. Pritchard (furniture, rug bathroom care)
FC&B, Chicago
Grp. mgmt. super., Carl Behr
Mgmt. acct. suprs., Linda Balogh, Daniel Fox
Grp. media dir., Ralph Katz
Media supers., Catherine Gerber, Helen Engelbrecht

Auditing Services select the PORTLAND MAINEstream.

Nielsen, Burgoyne, and SAMI look before they leap into a test market city. A large part of their success depends on selecting those markets that will best serve their customers — test marketers. They do extensive research and evaluation before committing their reputation to a test market city.



It is no coincidence that all three of the major auditing services are in Portland, Maine.

Portland, Maine is one of eight Nielsen Data Markets and has been since 1972. Burgoyne* has been conducting audits in the PORTLAND MAINEstream for over 20 years. And now SAMI has chosen Portland, Maine as one of their Scanner Service Markets.

Here are five basic reasons why the major auditing services and test marketers continue to work in the PORTLAND MAINEstream:

1. **Projectable Demographics** - that match the national averages with a deviation factor of less than 4%.

2. **Confidentiality/Isolation** - The PORTLAND MAINEstream has the least amount of spillage in the Northeast. It's unique geographic location keeps new products hidden longer.

3. **Economical Size for Testing** - 80% of the All Commodity Volume in the Portland trading area can be reached with just 14 supermarkets.

4. **Faster, More Accurate Results** - In Portland's controllable environment, sales patterns and repurchase cycles are established sooner. Problems are pinpointed faster. Variables can be more stringently governed so your test results will be more accurate.

5. **The Portland Press Herald, Evening Express and Sunday Telegram** - 98.8% of the newspapers' circulation is within the ADI. It offers 73% daily coverage of the Portland SMSA with one buy.

If the major auditing services select the PORTLAND MAINEstream there must be good reasons for test marketers to select it too. A. C. Nielsen, Burgoyne, and SAMI would not be there if it wasn't an excellent test market. And the best way to test the MAINEstream is with the Portland daily newspapers.

*Field-a-Test, subsidiary of Burgoyne.

Test Marketers select the Portland Press Herald, Evening Express.

Write for the detailed brochure, "The MAINEstream of America", to:
The Portland Press Herald, Evening Express, 390 Congress St., Portland, ME.

Nationally Marketed by
LANDON ASSOCIATES, INC.
22 OFFICES COAST-TO-COAST

J. Walter Thompson, Chicago
Mgmt. suprs.: Paula Kahn; Matt Kurz
Assoc. media dir., Shari Wall
Needham, Harper & Steers, Chicago
Mgmt. supr., Joan Black
Assoc. media dir., Robert Garrison

163.
AMERICAN DAIRY ASSN.

	media dollars 1979	1980
Magazines	$ 580,000	$ 1,623,000
Supps	—	—
Newspapers	334,000	534,000
Network tv	—	2,666,000
Spot tv	11,580,000	9,129,000
Network radio	269,000	423,000
Spot radio	2,127,000	2,287,000
Outdoor	339,000	312,000
Total	$15,229,000	$16,974,000

Classification: dairy products (LNA F-130)
Marketing/brand management:
Exec. vp., Barry D. Pfouts
Vp-creative svcs., Jane Holmes
Mgr. media plan. & serv., Donna Arcus
Agency: D-Arcy-MacManus & Masius, Chicago
Sr. vp-mgmt. supr., Benjamin Bishop
Vp-acct. grp. supr., Joanne Nottke
Vp-assoc. media dir., George J. Ker, Jr.
Med. super., Sandra S. Whitelaw

164.
CENTURY/21
Trans World Corp.

	media dollars 1979	1980
Magazines	$ 875,000	$ 72,000
Supps	—	—
Newspapers	—	—
Network tv	3,214,000	12,732,000
Spot tv	15,389,000	2,522,000
Network radio	—	—
Spot radio	1,092,000	1,332,000
Outdoor	832,000	33,000
Total	$21,402,000	$16,691,000

Classification: real estate (LNA G-520)
Marketing/Brand Management:
Dir. corp. planning, Bruce Oseland
Vp-adv., Bill Moseley
Agency:Wells, Rich, Greene/Townsend, Newport Beach, Calif.
Chm. WRG (West) & acct. supr., Ray Townsend
Vp. mgmt. super., Steve O'Leary
Vp dir. media, Jack Gowdy (N.Y.)

165.

PERT shampoo

Procter & Gamble

	media dollars 1979	media dollars 1980
Magazines	$190,000	$ 1,883,000
Supps	4,000	—
Newspapers	—	—
Network tv	—	13,103,000
Spot tv	478,000	1,628,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Total	$672,000	$16,614,000

Classification: hair products (LNA D-141)

Marketing/brand management:
Med. dir., Russ Condit
Asst. med. mgr., John Taylor

Agency: Compton Advertising, New York
Acct. grp. super., Philip Voss, Jr.
Sr. vp. media, Dawn Sibley
Med. mgr., Joe Burback

166.

FLORIDA CITRUS

Florida Citrus Commission

	media dollars 1979	media dollars 1980
Magazines	$ 112,000	—
Supps	—	—
Newspapers	442,000	461,000
Network tv	10,466,000	13,725,000
Spot tv	1,770,000	2,317,000
Network radio	—	—
Spot radio	8,000	—
Outdoor	—	—
Total	$12,798,000	$16,503,000

Classification: citrus products (LNA F-172-9

Marketing/brand management:
Mktg. dir., Douglas Hoffer
Adv. & prom. William P. Gordon
Mkt. research, George de Jager

Agency: Dancer Fitzgerald Sample, New York
Mgmt. supr., John L. Baldwin
Acct. supr., Jack Mascola (grapefruit)
Acct. supr., Donn Dolan (oranges)

167.

MORE cigarettes

R. J. Reynolds

	media dollars 1979	media dollars 1980
Magazines	$ 6,490,000	$ 8,387,000
Supps	316,000	2,652,000
Newspapers	5,295,000	3,751,000
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	78,000	1,659,000
Total	$12,179,000	$16,449,000

Classification: tobacco (LNA G-110)
Marketing/brand management:
Dir mktg. serv., Marty Orlowsky
Dir. media, Dan Pearson
Grp. plng. mgr., Bernie Banguess
Agency: Leber Katz Partners
Sr. mgmt. supr., Jerome Davidow
Mgmt. supr., Bob Hirsch
Acct. supr., Bob Shull

168.

Stouffer's

Nestle Enterprises

	media dollars 1979	media dollars 1980
Magazines	$1,606,000	$ 2,323,000
Supps	26,000	14,000
Newspapers	—	611,000
Network tv	2,929,000	6,013,000
Spot tv	5 041,000	7,359,000
Network radio	—	—
Spot radio	—	9,000
Outdoor	88,000	97,000
Total	$9,690,000	$16,426,000

Classification: prepared foods (LNA F-162, F-126, F-180, F-125)
Marketing/brand management:
Vp. mkt., Jerry VeCroce
Agency: Creamer, Inc., Pittsburgh
Med. dir., Allan Linderman

169.

GULF

Gulf Oil

	media dollars 1979	media dollars 1980
Magazines	$ 3,399,000	$ 5,073,000
Supps	35,000	—
Newspapers	1,629,000	2,539,000
Network tv	726,000	160,000
Spot tv	3,572,000	7,720,000
Network radio	463,000	453,000
Spot radio	1,524,000	261,000
Outdoor	27,000	23,000
Total	$11,375,000	$16,229,000

Boys' Life reaches 3½ million big appetites every month.

Boys are two-fisted eaters. They particularly like cookies, snack cakes, fruit, cereal, ice cream, candy and gum—followed by large quantities of milk and soda.

What's more, boys choose the brands they consume. This is true for the foods their families buy, as well as the ones boys pay for themselves. A subscriber survey by Erdos & Morgan, Inc. showed 93% of all Boys' Life subscribers select, or influence the selection of, brands of food bought by their family for use at home, on cookouts, etc.

A new Reader Panel survey of the Boys' Life market for snacks, cereals and desserts was conducted this Spring by Leslie A. Riffkin & Associates. The report on this survey is based on a 77% response rate, and provides extensive coverage of brand preference, consumption levels and purchase influence.

For details on the findings of this report, and how you can reach this lucrative market, call Bob Goldsmith, Marketing Director, at (212) 532-0990, or contact your local Boys' Life representative.

When the male youth market is your target audience, you can't miss with

BOYS' LIFE
THE MAGAZINE FOR ALL BOYS
Published by the Boy Scouts of America

(212) 532-0985 (213) 802-2571
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Tampa Bay is the Fastest Growing Major Metro Market in the Southeast

. . . growing faster than Miami and Atlanta. Believe it! There is more than $1.4 billion in commercial construction now under way in the City of Tampa alone. The dynamic Tampa Bay market is comprised of Hillsborough, Pasco and Pinellas Counties. Be sure your print schedules include these powerful newspapers.

THE TAMPA TRIBUNE
Morning and Sunday
The Tampa Times
Evening and Sunday

Media General Newspapers
Represented by Sawyer-Ferguson-Walker
Contact:
Byron Taggart, General Advertising Manager
P. O. Box 191, Tampa, Florida 33601
(813) 272-7447

Source: S&MM Survey of Buying Power, 1980

Classification: gasoline, lubricants (LNA T-200)

Marketing/brand management:

Sr. dir. adv. & corp. commun., T.E. Latimer

Young & Rubicam, New York

Sr. vp-acct. super., John Hathaway

Vp-media, George Sharp

170.

LONG JOHN SILVER restaurants

Jerrico, Inc.

	media dollars	
	1979	1980
Magazines	—	—
Supps	—	—
Newspapers	—	—
Network tv	$ 1,876,000	—
Spot tv	10,500,000	$16,053,000
Network radio	—	—
Spot radio	—	—
Outdoor	15,000	1,000
Total	**$12,391,000**	**$16,054,000**

Classification: restaurants (LNA G-330)

Marketing/brand management:

Vp.-mktg., Walter Stumpe

Advertising Agency: Abbott (in-house)

Bill Meehan, acct. super.

Vp. media serv., Jean Babington

Med. dirs., Michael Kern, Larry Brewer

171.

AIM toothpaste

Lever Bros.

	media dollars	
	1979	1980
Magazines	$ 860,000	$ 718,000
Supps	22,000	—
Newspapers	211,000	—
Network tv	11,260,000	10,937,000
Spot tv	3,243,000	4,376,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Total	**$15,596,000**	**$16,031,000**

Classifications: personal hygiene (LNA D-120); medicines (LNA D-210)

Marketing/brand management:

Category dir., J. E. Blutenthal

Sr. prod. mgr., M. Soriano

Agency: JWT, New York

Sr. vp-grp. dir., Jack Morrissey

Vp-mgmt. supr., B. Lothrop

Vp-assoc. media dir., Charlotte Weissenberger

Sr. vp-dir. plng., John Gray

172.

SUBARU cars

Subaru of America

	media dollars	
	1979	1980
Magazines	—	$ 2,398,000
Supps	—	—
Newspapers	$388,000	764,000
Network tv	—	7,278,000
Spot tv	—	5,073,000
Network radio	—	—
Spot radio	17,000	343,000
Outdoor	—	58,000
Total	**$405,000**	**$15,914,000**

Classification: passenger cars (LNA T-112)

Marketing/brand management:

Vp., Ben DeWitt

Adv. mgr., Mike Libby

Agency: Levine, Huntley, Schmidt, Plapler & Beaver, New York

Vp.-acct. super., Tarry Bonaccoita

print media mgr., Vivian Riley

Tv media mgr., Jim Dragoumis

173.

BLUE CROSS

Blue Cross/Blue Shield Assns.

	media dollars	
	1979	1980
Magazines	$ 2,685,000	$ 2,394,000
Supps	—	—
Newspapers	3,806,000	5,574,000
Network tv	110,000	—
Spot tv	5,191,000	5,203,000
Network radio	—	—
Spot radio	1,659,000	2,534,000
Outdoor	205,000	142,000
Total	**$13,656,000**	**$15,847,000**

Classification: group insurance (LNA B-210)

Marketing/brand management:

National Account

Sr. vp-mktg., Paul Marquardt

Vp-pub. affairs, Richard F. O'Connell

Agency: N. W. Ayer, Campbell-Mithun, Chicago

Acct. supr., Dan Helsdinger

Mgmt. supr., James Lurie

Acct. supr., Owen Enright

Acct. exec., Phil May

Media dir., Tom Spasari

Assoc. media dir., Rose Decker

Media planner, Dodie Enright

174.

CHEF BOY-AR-DEE foods

American Home Products

	media dollars	
	1979	1980
Magazines	$ 1,318,000	$ 589,000
Supps	119,000	7,000
Newspapers	209,000	203,000
Network tv	10,679,000	10,697,000
Spot tv	3,036,000	3,360,000
Network radio	1,189,000	766,000
Spot radio	62,000	99,000
Outdoor	—	—
Total	**$16,550,000**	**$15,721,000**

Classification: prepared foods (LNA F-120)

Marketing/brand management:
Vp.-mktg. dir., Ted Host
Vp. prod. mgmt., K. H. Becker
Adv. dir., Warren Kratzke
Prod. mgrs., Dick Prentice, Paul Derez, J. Horvrath, Robert Gjessing, R. Lorys

Agency: Y&R, New York
Acct. supr., Carlos Ordonez
Vp, media grp. supr., Carla Pascale
Media supr., Donna Campanella

175.

HEAD & SHOULDERS shampoo

Procter & Gamble

	media dollars	
	1979	1980
Magazines	$ 655,000	$ 896,000
Supps	129,000	246,000
Newspapers	—	—
Network tv	8,403,000	11,287,000
Spot tv	3,776,000	3,256,000
Network radio	—	—
Spot radio	118,000	—
Outdoor	—	—
Total	**$13,081,000**	**$15,685,000**

Classification: shampoos (LNA D-121)

Marketing/brand management:
Assoc. ad. mgr., John Costello
Med. dir., Russ Condit

Agency: Tatham-Laird & Kudner, Chicago
Acct. super., Tom Kettinger
Acct. exec., Mary Johnson
Head media planner, Joanne Franck

The Morning Union
The Daily News
The Sunday Republican

Security Blanket.

When you buy Springfield you can rest easy.
Secure in the knowledge that you've invested wisely.
We blanket 85% of the SMSA and have the highest
ADI penetration in New England—61%!

Springfield . . . the market of your dreams.

Largest in Massachusetts outside Boston
The Springfield Newspapers
Represented by Newhouse Newspapers

CITY EXPLODES!

BUILDING BOOM

An elegant $36 million Hyatt Regency . . . A new Ohio Convention Center . . . The 40-story Nationwide Insurance Corporate headquarters . . . Just a few of the concrete facts . . . Columbus is anticipating a real population growth of 5.2% by 1984.*

PEOPLE BUY

Over a million buyers with an effective buying income of over $8.5 billion . . . Total retail sales of over $4.5 billion.* The Dispatch and Citizen-Journal reach 464,000 of these buyers daily . . . One ad reaches 123,000 (68% of the SMSA**) college graduates and 139,700 (72% of the SMSA**) adults with household income of $30,000 or more.

BUSINESS UPDATE

Columbus, Ohio is big news for marketers and The Columbus Dispatch and Citizen-Journal are making headlines in more ways than one. Contact one of our representatives today to find out how you can become a part of the story behind the headline. Just call (614) 461-5204.

*S&MM Survey of Buying Power 1980 **Belden CMS 1980

The Columbus Dispatch
SUNDAY and EVENING
Columbus Citizen-Journal
MORNING

Represented nationally by
Cresmer, Woodward, O'Mara & Ormsbee, Inc. In Florida — The Leonard Company

176.

PARKER BROS. games

General Mills

	media dollars 1979	media dollars 1980
Magazines	$ 336,000	$ 1,565,000
Supps	—	—
Newspapers	—	—
Network tv	7,968,000	11,904,000
Spot tv	1,826,000	2,015,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	26,000
Total	**$10,130,000**	**$15,510,000**

Classification: games (LNA G-450)
Marketing/brand management:
Vp.-mktg., Dick Daleffio
Agency: Humphrey Browning MacDougall, Boston
Med. dir., Joe Steiner
Med. buyers, Louise Doherty, M. P. Kelleher

You may never see the world's largest crab* . . .

. . . but cheer up. You can still have the largest adult audience in Western Michigan with WKZO-TV.

With more than $8.7 billion in Effective Buying Income, the Grand Rapids-Kalamazoo-Battle Creek ADI ranks 39th in the nation according to Sales & Marketing Management's 1979 Data Service. And among consumers there, WKZO-TV ranks first.

From 9 a.m. to Midnight, Sunday through Saturday, more adults 18+ watch WKZO-TV than any other station in the market. It's No. 1 in both Metro and ADI audience share, too.**

So, if you want to get your message to active buyers in Western Michigan, get the good news about WKZO-TV from your Avery-Knodel representative.

*According to the 1980 Guinness Book of World Records, the largest crab is the giant spider crab, also called the stilt crab, found in the deep waters off the southeastern coast of Japan. Mature specimens of up to 19' in length have been reported.

**Arbitron ADI, May 1980.

50th Anniversary

WKZO-TV
Channel 3 · A CBS Affiliate · 100,000 WATTS 1000 FT. TOWER
KALAMAZOO-GRAND RAPIDS AND GREATER WESTERN MICHIGAN
Avery-Knodel Television National Representatives

177.

KEN-L RATION pet food

Quaker Oats

	media dollars 1979	media dollars 1980
Magazines	$ 2,342,000	$ 1,714,000
Supps	375,000	—
Newspapers	760,000	404,000
Network tv	9,398,000	12,189,000
Spot tv	1,649,000	879,000
Network radio	—	—
Spot radio	12,000	12,000
Outdoor	53,000	—
Total	**$14,588,000**	**$15,198,000**

Classification: pet foods (LNA G-531)
Marketing/brand management:
Group prod. mgr., Cathy Jaros
Vp-prod. mgmnt./Pet foods div., Jim Kauffman
Agency: JWT, Chicago
Sr.-vp med. dir., Robert H. Irvine
Vp-adv., Elizabeth Harrington

178.

FIAT cars

	media dollars 1979	media dollars 1980
Magazines	$ 3,575,000	$ 3,631,000
Supps	—	—
Newspapers	1,697,000	1,437,000
Network tv	2,230,000	2,245,000
Spot tv	6,108,000	6,458,000
Network radio	—	—
Spot radio	228,000	1,331,000
Outdoor	150,000	13,000
Total	**$13,988,000**	**$15,115,000**

Classification: cars (LNA T-112)
Marketing/brand management:
Vp-planning & mktg. services, Vincenzo Barello
Natl. adver. mgr., A. Dudley Coan
Agency: Benton & Bowles, New York
Assoc. media dir., Frank Massaro
Asst. media dir., Tony O'Haire
Planners: James Engel, Peter Diskin
Asst. planner, Alison Violano

179.

OSCAR MAYER meats

	media dollars 1979	media dollars 1980
Magazines	—	—
Supps	—	—
Newspapers	$ 626,000	$ 190,000
Network tv	10,410,000	14,439,000
Spot tv	1,065,000	378,000
Network radio	68,000	—
Spot radio	1,126,000	—
Outdoor	—	—
Total	**$13,295,000**	**$15,007,000**

Marketing/brand management:
Vp. con. prod. div., Thomas Duesler
Mktg. mgr. con. prod. div., Thomas J. Smith
Sls. prom. mgr. con. prod. div., Thomas Phillips
Agency: JWT/Madison, Wisconsin
Sr. vp, John Furr
Vp-mgmt., supr., Tom Goetsche
Acct. supr., Rick Anderson

180.
SECRET deodorant
Procter & Gamble

	media dollars	
	1979	1980
Magazines	$ 1,831,000	$ 1,743,000
Supps	—	—
Newspapers	88,000	19,000
Network tv	9,256,000	11,606,000
Spot tv	2,099,000	1,586,000
Network radio	—	—
Spot radio	—	20,000
Outdoor	—	—
Total	**$13,274,000**	**$14,974,000**

Classification: Depilatories & deodorants (LNA D-124)
Marketing/brand management:
Brand mgr., Rad Ewing
Dir. of media, Russ Condit
Media asst., Patricia Grant
Agency: Leo Burnett, Chicago
Acct. exec., Hank Kogan
Assoc. media dir., Bob Kirkpatrick

181.
PREPARATION H
American Home Products

	media dollars	
	1979	1980
Magazines	$ 1,521,000	$ 1,334,000
Supps	138,000	186,000
Newspapers	697,000	604,000
Network tv	6,753,000	6,976,000
Spot tv	2,467,000	1,854,000
Network radio	786,000	638,000
Spot radio	2,550,000	3,349,000
Outdoor	—	—
Total	**$14,912,000**	**$14,941,000**

Classification: medicine (LNA D-210)
Marketing/brand management:
Grp. mgr., G. Wosleger
Prod. mgr., H. Dies
Agency: John F. Murray, New York (in-house)
Mgmt. supr., C. Hasser
Acct. supr., Bob Cooney

182.
SWIFT meats
Esmark, Inc.

	media dollars	
	1979	1980
Magazines	$ 97,000	$ 150,000
Supps	158,000	234,000
Newspapers	942,000	783,000
Network tv	6,254,000	10,346,000
Spot tv	4,277,000	3,374,000
Network radio	—	—
Spot radio	—	—
Outdoor	1,000	—
Total	**$11,729,000**	**$14,887,000**

Classification: meats (LNA F-150)
Marketing/brand management:
Dir. mktg., serv., Elliot Shear
Med. dir., Jack Ragel
Agencies: Grey Advertising
Mgmt. super., Jeff Stein
Assoc. med. dir., Jim Bell
FC&B, Chicago
Med. dir., Kent Vlautin

183.
HOLIDAY INN

	media dollars	
	1979	1980
Magazines	$ 3,601,000	$ 3,636,000
Supps	—	—
Newspapers	47,000	13,000
Network tv	9,702,000	8,900,000
Spot tv	802,000	649,000
Network radio	—	—
Spot radio	39,000	59,000
Outdoor	1,265,000	1,489,000
Total	**$15,456,000**	**$14,746,000**

Classification: hotels (LNA T-431)
Marketing/brand management:
Sr. vp-mktg., Christopher C. Browne
Vp.-systems mktg., Roger Corby
Dir., sys. adv., Scott Deaver
Agencies: Young & Rubicam
Vp-med. grp. supr., Bruce Wager
Med. super., Greg Billie

184.
PORCELANA CREAM
Jeffrey Martin

	media dollars	
	1979	1980
Magazines	$ 266,000	$ 163,000
Supps	—	—
Newspapers	—	—
Network tv	27,000	7,259,000
Spot tv	3,322,000	4,271,000
Network radio	1,980,000	3,033,000
Spot radio	8,000	—
Outdoor	—	—
Total	**$5,603,000**	**$14,726,000**

Classification: skin cream (LNA D-216)
Marketing/brand management:
Pres., Martin Himmel
Ad. mgr., John Sullivan
Agency: Dunnan & Jeffrey (in-house)
Pres., Martin Himmel

185.
DOWNY softener
Procter & Gamble

	media dollars	
	1979	1980
Magazines	$ 826,000	—
Supps	—	—
Newspapers	—	—
Network tv	9,669,000	11,134,000
Spot tv	4,190,000	3,575,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Total	**$14,685,000**	**$14,709,000**

Classification: laundry preparations (LNA H-420)
Marketing/brand management:
Brand mgr., Vandy Van Wagoner
The media group includes:
Dir. of media, Russ Condit
Media asst., Patricia Grant
Agency: Grey, New York
Mgmt. supr., Neil Kreisberg
Acct. supr., Ira Mathathia

186.
WALT DISNEY
Walt Disney Productions

	media dollars	
	1979	1980
Magazines	$ 1,050,000	$ 1,209,000
Supps	—	—
Newspapers	259,000	146,000
Network tv	9,676,000	7,206,000
Spot tv	7,430,000	6,082,000
Network radio	—	—
Spot radio	130,000	—
Outdoor	24,000	28,000
Total	**$18,310,000**	**$14,671,000**

Classification: motion picture (LNA G-310), amuse. (LNA G-320)
Marketing/brand management:
Vp. med. mktg., Carla Christenson
Mktg. services, Bob King
Agency: Vista Advertising, Anaheim (house agency)
Mgr., Susan Olive
Bdcst. buyer, Sandy Dawson
Print buyer, Willy Ledon

187.

KLEENEX tissues

Kimberly-Clark

	media dollars	
	1979	1980
Magazines	$ 222,000	$ 168,000
Supps	—	324,000
Newspapers	312,000	574,000
Network tv	5,302,000	5,994,000
Spot tv	5,265,000	7,609,000
Network radio	—	—
Spot radio	8,000	—
Outdoor	28,000	—
Total	**$11,137,000**	**$14,669,000**

Classification: paper products (LNA D-132, A-121, H-232)
Marketing/brand management:
Vp.-mktg., J. B. Bernd
Agency: Leo Burnett, Chicago
Acct. super., Ken Yednock
Assoc. med. dir., Chuck Quarnstrom

188.

TIMEX watches & clocks

	media dollars	
	1979	1980
Magazines	$ 420,000	$ 289,000
Supps	956,000	1,183,000
Newspapers	1,844,000	2,104,000
Network tv	10,572,000	10,573,000
Spot tv	1,202,000	228,000
Network radio	—	—
Spot radio	—	272,000
Outdoor	—	—
Total	**$14,994,000**	**$14,649,000**

Classification: watches (LNA G-606)
Marketing/brand management:
Vp-mktg., C. Michael Jacobi
Dir. mktg., Morris Pennington
Agencies: Grey Advertising
Sr. vp-mgmt. rep., Clark Montgomery
Assoc. media dir., Richard Phaler
Kenyon & Eckhardt, Boston
Vp-media dir., Nancy Sullivan
Acct. supr., Cindy Connelly

189.

DORAL cigarettes

R. J. Reynolds

	media dollars	
	1979	1980
Magazines	$ 7,436,000	$ 7,609,000
Supps	3,740,000	2,390,000
Newspapers	9,200,000	4,549,000
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	415,000	4,000
Total	**$20,791,000**	**$14,552,000**

Classification: cigarettes (LNA G-111)
Marketing/brand management:
Brand mgr., Dan Murphy
Dir. mktg. serv., Marty Orlowsky
Med. dir., Dan Pearson
Agency (for creative) BBDO

190.

BUFFERIN analgesic

Bristol-Myers

	media dollars	
	1979	1980
Magazines	$ 1,112,000	$ 630,000
Supps	93,000	106,000
Newspapers	14,000	19,000
Network tv	11,160,000	11,862,000
Spot tv	2,316,000	1,643,000
Network radio	—	—
Spot radio	123,000	170,000
Outdoor	—	—
Total	**$14,818,000**	**$14,430,000**

Classification: medicine (LNA D-210)
Marketing/brand management:
Dir. adv. serv., Robert Turner
Prod. mgr., Charles Hinkaty
Grp. prod. mgr., Ben de Young
Dir. Boclaro, Santo Critelli
Mgr., Boclaro, Jack Sinnott
Assoc. dir., Alan Yoblon
Agencies: Bolcaro Inc. (in-house)
(Creative is handled by Ted Bates — Mgmt. rep., Dick Mullan.)

191.

STAYFREE pads

Johnson & Johnson

	media dollars	
	1979	1980
Magazines	$ 3,229,000	$ 2,664,000
Supps	—	110,000
Newspapers	—	580,000
Network tv	9,415,000	10,514,000
Spot tv	51,000	4,000
Network radio	—	464,000
Spot radio	—	84,000
Outdoor	—	—
Total	**$12,695,000**	**$14,420,000**

Classification: Feminine hygiene products (LNA D-123)
Marketing/brand management:
Prod. dirs., Geoffrey A. Crane, Carol Naiman
Agency: Young & Rubicam
Mgmt. supr., Ricardo Calvillo
Acct. supr., Eva Scolmatz
Acct. exec., Jim Martin
Vp.-med. grp. super., Ira Tumpowsky
Media supr., Donald Davies
Media planners, Tom Butta, Kevin Blechman

192.

CONTAC cold remedy

SmithKline

	media dollars	
	1979	1980
Magazines	$ 509,000	$ 400,000
Supps	—	—
Newspapers	—	—
Network tv	12,429,000	11,093,000
Spot tv	1,675,000	1,637,000
Network radio	2,542,000	1,208,000
Spot radio	80,000	8,000
Outdoor	—	—
Total	**$17,235,000**	**$14,346,000**

Classification: medicine (LNA D-210)
Marketing/brand management:
Senior brand mgr., Thomas D. Miller
Agency: Ogilvy & Mather, New York
Sr. vp-media dir., Larry Cold
VP-assoc. media dir., Jack Deitchman
VP-asst. media dir., Pat Braun

193.

BOUNCE fabric softener

Procter & Gamble

	media dollars	
	1979	1980
Magazines	$ 1,210,000	$ 1,464,000
Supps	—	—
Newspapers	44,000	—
Net tv	8,362,000	8,955,000
Spot tv	4,449,000	3,897,000
Net radio	—	—
Spot radio	—	—
Outdoor	—	—
Total	**$14,065,000**	**$14,316,000**

Classification: cleanser (LNA H-420)
Marketing/brand management:
Brand mgr., Alice C. Malcalm
The media group includes:
Dir. of media, Russ Condit
Media asst., Patricia Grant
Agency: Benton & Bowles, New York
Acct. supr., Pat Doody
Assoc. media dir., Frank Henderson

194.

RENAULT

American Motors

	media dollars	
	1979	1980
Magazines	$1,971,000	$ 3,854,000
Supps	—	—
Newspapers	2,797,000	794,000
Network tv	—	4,626,000
Spot tv	121,000	4,884,000
Network radio	—	—
Spot radio	403,000	15,000
Outdoor	5,000	—
Total	**$5,297,000**	**$14,173,000**

Classification: passenger cars (LNA T-112)

Marketing/brand management:

Dir. corp., relations, Leon Forth

Agency: Grey Advertising, New York

Acct. super., Ray Raaver

Acct. exec., Ellen Crauthamer

Med. super., Jack Jadick

195.

UNITED ARTISTS

Transamerica Corp.

	media dollars	
	1979	1980
Magazines	$ 601,000	$ 390,000
Supps	—	—
Newspapers	70,000	16,000
Network tv	11,528,000	8,190,000
Spot tv	7,604,000	5,448,000
Network radio	—	—
Spot radio	196,000	116,000
Outdoor	98,000	8,000
Total	**$20,097,000**	**$14,168,000**

Classification: motion pictures (LNA G-310); record and tape recordings (LNA H-330)

Marketing/brand management:

Vp-worldwide advtg./pub., Hy Smith

Vp-advtg./pub., Edward Seigenfeld

Dir. of media, Terry Steiner

Agency: Diener/Hauser/Bates

Acct. supr., David Rosenfelt

Vp-Media dir., Norman Trell

196.

WHIRLPOOL appliances

Whirlpool Corp.

	media dollars	
	1979	1980
Magazines	$ 4,078,000	$ 3,679,000
Supps	236,000	184,000
Newspapers	26,000	1,843,000
Network tv	6,451,000	5,691,000
Spot tv	2,452,000	2,345,000
Network radio	—	120,000
Spot radio	368,000	140,000
Outdoor	106,000	23,000
Total	**$13,717,000**	**$14,025,000**

Classification: major appliances (LNA H-210)

Marketing/brand management:

Dir.-mktg. comm., David Allen

Dir., adv./sales prom., Ronald Gow

Nat. adv. mgr., Jim Clever

Agency: The Netedu Co., Benton Harbor, MI

Mgmt. supr., Charles F. Worthington

Acct. execs.: John Hoffman, Carl Coon, Dave Groeki, Bill Sherrington, Rich Stone.

D'Arcy-MacManus & Masius Bloomfield Hills

Mgmt. super., Richard P. Monley

Acct. super., Ken Brandt

197.

ALBERTO hair products

Alberto-Culver

	media dollars	
	1979	1980
Magazines	$ 8,000	$ 151,000
Supps	—	—
Newspapers	—	—
Network tv	5,006,000	7,846,000
Spot tv	9,750,000	5,925,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Total	**$14,764,000**	**$13,922,000**

Classification: hair treatment products (LNA D-141)

Marketing/brand management:

Vp-adv. services, Henry Wittemann

Prod. mgr., Anne M. Gedicott

Agencies: Draper Daniels, Media Services, Inc., Chicago (Handles all media buying)

Vp-gen mgr., Cecilia Odziomek

Vp-assoc. media dir., Pat Brouwer

Lee King & Partners, Chicago

Pres., Lee King

198.

TAB soft drinks

Coca-Cola Co.

	media dollars	
	1979	1980
Magazines	$ 839,000	$ 545,000
Supps	—	—
Newspapers	40,000	10,000
Network tv	4,411,000	5,967,000
Spot tv	8,251,000	7,061,000
Network radio	—	—
Spot radio	118,000	160,000
Outdoor	140,000	113,000
Total	**$13,799,000**	**$13,856,000**

Classification: soft drinks (LNA F-220)

Marketing/brand management:

Asst. brand mgr., Frances Stuart

Dir.-media serv., Albert E. Davis

Agency: McCann-Erickson, Inc. Atlanta

Sr. vp, Donald Challis

Acct. supr., David Clapp

199.

DEXATRIM capsules

Thompson Medical

	media dollars	
	1979	1980
Magazines	$ 684,000	$ 1,121,000
Supps	—	—
Newspapers	—	—
Network tv	4,064,000	11,750,000
Spot tv	234,000	922,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Total	**$4,982,000**	**$13,793,000**

Classification: medicine (LNA D-217)

Marketing/brand management:

Vp.-mktg., Ron Stern

Vp. adv., Paul Craniotes

Agency: Compton Advertising, New York

Acct. super., D. Bounauro

Med. dir., Dawn Sibley

200.

HALLMARK cards

Hallmark Cards

	media dollars	
	1979	1980
Magazines	$ 633,000	$ 27,000
Supps	57,000	—
Newspapers	—	—
Network tv	12,565,000	13,560,000
Spot tv	32,000	61,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Total	**$13,287,000**	**$13,658,000**

Classification: greeting cards (LNA B-321)

Marketing/brand management:

Natl. ad. mgr., Jim McDowell

Agency: FC&B, Chicago

Acct. super., Mitch Engel

groundwork to cover in the related areas of marketing, media and creative research before we can begin to weight the real value of narrowcast programing. Some of the challenges which come to mind are:

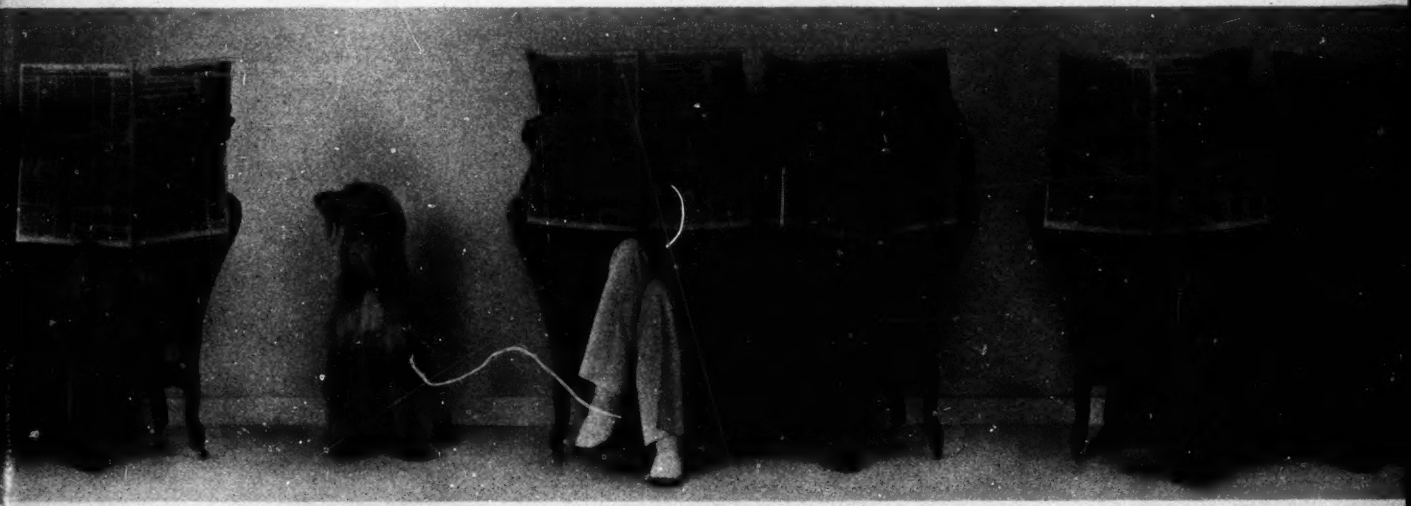
- *Refining our target data*. Who do we really want to reach, demographically and psychographically.
- *Pinpointing sales*. Geographic sales data will become increasingly important as cable poses the possibility of zip code television buys.
- *Developing census profiles of cable systems*. While various marketing firms are already providing this for a price, few marketers can provide the corresponding product information to make good use of it!
- *Experimenting with media/ marketing computer programs*. Media departments have yet to incorporate the more fragmented marketing and media data into computer planning systems.
- *Researching the creative options of cable*. What is the viewer attitude towards longer infomercials, or low-clutter sponsorships of specialized programing? Is the involved viewer so interested in the on-air tennis lesson that he or she will not tune out the almost-integrated tennis racquet commercial? Or will there be so many programing options that the viewer will push that remote-control button to switch channels or "zap-out" the commercial with a quick look at the teletext information channel. What is the impact of 1.0 ratings in the total media mix? What is mind-boggling is what we *don't* know about viewer program involvement and commercial messages, channel switching behavior, and low-rated, but targeted impact.

Buying cable in 1980 was fun. Buying cable in the coming year with promised audience research will certainly allow us professionally to breathe easier. But planning cable in the total media/marketing mix and understanding creatively how narrowcasting works best is the real challenge ahead. Thank the $50 cpm for helping us to think seriously about it. ■

AGRI-MEDIA
by MEL DOLINKY
media director
Bader Rutter & Associates
Brookfield, Wisconsin

Tv or not tv– is that the question?

There are those who still say that television should not be considered as a vehicle to reach the agricultural market. The standard rationale for this is,



In Houston, there are still some members of affluent households who don't read The Chronicle.

Both Houston newspapers cost about the same.

But among adult newspaper readers in households earning $35,000 or more, roughly two-thirds choose The Chronicle. That's 184,000 on weekdays. And 213,000 on Sundays.

In fact, The Chronicle leads the entire Southwest in total readership, as well as circulation and ad linage.

So to reach a better audience in Houston, you can't do better than The Chronicle.

For more information, call our national representative, Sawyer Ferguson Walker.

Houston Chronicle

"It's not efficient. You have to pay for all those non-farm metro viewers." However, a case can be built for tv.

Keep in mind that there are no inherently bad media. Each has its own positives when properly used. Until recently there was little documentation on farmer tv viewership. Recent columns here have dealt with the Katz Television Farm Study which demonstrated that not only do farmers watch tv, but at certain times of the year, and in certain dayparts, a higher percentage of them are viewing tv than their non-farm counterparts.

Rather than dwell on how many non-farmers tv may deliver, let's examine efficiency in reaching the farm audience. Table A shows the number of farmers, average costs for a late news spot, and cost per thousand farmers.

It is presumed that there is one buying influence per farm unit. Because few agricultural marketers want to reach all farmers in a market, and since not all farmers view tv, let's isolate just corn farmers and make an adjustment for viewership. The Katz Study indicated that an average of 44% of the farmers view late news in spring. (This compares with 39% of all men 18+). The chart now looks like Table B.

Let's compare these CPM's with print. The print costs are based on a full page black and white insertion. The circulation base is for a complete state since print can't be bought on an ADI basis yet. It is logical to presume that the CPM's would be even higher if a smaller area was bought (Table C).

And then let's adjust for corn farmers, giving the magazines credit for 100% reach even if circulation is less than the number of corn farmers (Table D).

Regardless of non-farm viewers, tv holds its own.

This analysis leaves a lot of room for "ya buts". Ya but this or that. So to clarify just a few points:

1. The tv costs are not negotiated rates. A good buyer could save 15%-20%.

2. A page ad creates a different level of impact than one tv spot. Who would ever buy just one tv spot? To factor in the costs of a solid tv schedule would also require adjusting for frequency.

3. The comparison is for state

coverage in print and ADI coverage in tv. (But that's the way they are bought. Besides we're looking at comparative CPM's).

4. We're giving credit for 100% coverage in print and that's not the real world.

5. Etc., etc., etc.

The point is this:

If television is analyzed and bought correctly, the argument that the waste viewership of non-farmers makes tv a bad media buy is not valid. When you compare efficiencies in reaching a specific audience segment, tv can be a competitively efficient part of the media mix. ■

MEDIA RESEARCH
by BERNARD GUGGENHEIM
sr. vp, group director
media information services
Campbell-Ewald, Detroit

Who said magazines aren't dynamic?

We seem to be so preoccupied with the "new electronic media" that sometimes I wonder if many of us haven't overlooked a medium that has and is continuing to exhibit, as much change, growth and vitality. I'm speaking about consumer magazines.

It seems like new consumer magazines are being started every day. For example, the science category, which really didn't exist just a few short years ago (apart from *Scientific American*), now has *Discover* and *Science Digest* to name just two. In fact, this fall, two new science magazines are scheduled for publication — *High Technology* and *Technology Illustrated*. Magazines dealing with personal computing didn't exist ten years ago and today there are eight publications in the field with a gross circulation of over a half-million per issue. Magazines covering the women's market like *Ms.*, *Savvy* or *Essence* weren't in business ten years ago.

In fact, a tabulation we prepared recently comparing 1960 with 1980 found that there were 737 magazines being published in 1980 that were not in existence in 1960 (Table I); and 320 magazines that had been published in 1960 were no longer in business in 1980. *A dynamic business? You bet!*

Or look at the growth in the number of copies sold in 1960 and compare it with 1980. Gross annual circulation is up 92% (Table II). During the same period, the number of U.S. households increased 50% and, therefore, the average household is receiving 29% more copies per year.

Magazines have done well over the past 20 years, and they've done well because, for the most part, publishers have reacted to, and anticipated, change. They've looked at the economy and produced magazines like *Money*. And they've looked at the decline in functional literacy and produced magazines like *People* and *Us*. Given the track record I'm sure that magazine publishers will pick up on new evolving trends and produce magazines to fulfill those yet undetermined needs of the consumer.

[illegible]

What does this mean to us in the media research or the media buying/planning area? Quite simply, it means that the way in which we evaluate these magazines — both quantitatively and qualitatively — *will have to stay as current as these publishing concepts*.

On the quantitative side, a lot of us are still "hung up" with the desire to measure total audience. The "industry" says that a total audience study *has to* cover 100-plus audience. But do we really?

The new magazines that I'm talking about are for the most part relatively small circulation magazines. The sample sizes that we get in the current syndicated studies for the smallest 50 magazines are inadequate to describe anything but gross audience demographics. The syndicated studies are unable to delineate the *unique qualitative strengths* of magazines in reaching special interest/demographic groups.

What's wrong with a good subscriber study?

Have we forgotten that 20 years ago all we had were subscriber studies?

Have we forgotten how to evaluate magazines without the use of those omnibus total audience studies?

What's happened to informed judgment?

Well, not everything can be quantified and we at Campbell-Ewald are trying to make sure that our buyers and

[illegible]

planners are equipped to evaluate publications properly.

Not long ago we invited the Magazine Publishers Association to develop a day-long workshop for our staff. The charge that my boss, Tom Glynn, gave them was: "Spend a day selling magazines to us without using total audience once!" We want you to refresh and reemphasize to our buyers and planners that there are dozens of attributes — *other than total audience* — that are important in the magazine selection process.

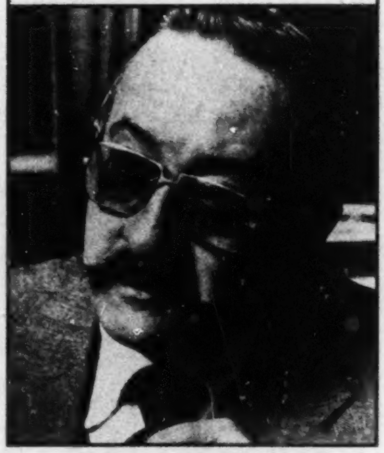
Training is an on-going job, and this workshop is designed to be part of our staff's continuing post-graduate education on what's *really important!*

That's how we are keeping up with the dynamics of the magazine business. ■

CONSUMER MAGAZINES

by ROGER C. BUMSTEAD

sr. vp dir. of media planning
The Marschalk Company, New York



Resourcefulness

My dictionary lists six definitions of the primary word — resource: 1) source of supply; 2) means of producing wealth; 3) money or other assets; 4) personal, mental or other capabilities; 5) an expedient action in an emergency; 6) capability in dealing with a situation or difficulty.

Resourcefulness, the derivative noun, extends the meaning to actions . . . "full of resources, fertile in expedients".

Each of the primary "resource" meanings are relevant to the consumer magazine scene in the early 1980's when, so far, the business picture for magazines is beginning to have a deja vu *look quite similar to the early 70's. . . when the industry suffered the loss of several mass circulation books.*

The LNA/PIB figures for 1980 showed a decline (vs. 1979) of 336 pages . . . and magazines, share of total ad spending also declined slightly . . . after several steady growth years in the late 1970's. The first quarter 1981 picture was equally dismal. This is a picture that calls upon the magazine business to exhibit the ultimate in resourcefulness. Looking to the near term . . . and to the long-range future, consumer magazines have an abundance of resources . . . which when combined with *resourcefulness* will pay off for readers, advertisers and publishers. Here's how I'd back up the definitions of "resources" with the current magazine scene:

1. *A Source of Supply:* I relate this to the reading American (and worldwide, as well) public. Magazines have increasingly provided a wide diversity of information of real value . . . serious "how to do it" and "how to handle it" articles as well as lighter diversionary or entertainment content. Magazines have led change . . . and positively affected current lifestyle values. The trends to naturalness, conservation . . . the liberalism of the 60's and early 70's. . . and the present skew to political conservatism can all be attributed to magazines. And more specifically, Americans learned about gourmet cooking, soccer and smaller, more fuel efficient cars from magazines.

2. *Means of Producing Wealth:* Magazines contribute handsomely to the Gross National Product . . . as a major industry themselves . . . as an editorial generator of new ideas on the use of products and services . . . and, most obviously, as carriers for either brand building or retail action stimulus advertising (i.e. incentive offers or direct response).

3. *Money or other assets:* Magazines have become an increasingly valuable income source (i.e. high turnover, little floor space) for the profit-poor supermarket industry. The magazine industry's efforts to increase reader revenues either through greater emphasis on newsstand sales or higher subscription prices have resulted in lower cpm increases over the past decade than other major media in these times of high inflation. That fact gives magazines a true asset value for advertisers.

4. *Mental or Other Capabilities:* This is an area where the magazine industry has stretched itself too thin for its own self-interests.

Over the past ten years, we have been bullish on new magazine start ups . . . but both the current economic picture and the plethora of new publications has made me bearish on totally new publications.

Professionally, we'd question the financial risks of starting new books from an investor's standpoint . . . and whether most new entries offer lasting values to readers and advertisers.

We set down some basic guidelines for new publications several years ago — which, briefly recapped, go as follows: A. Does the editorial concept fill a potentially meaningfull communications void to the reading public?

> **"The business picture for magazines is beginning to look like the early 70's when the industry suffered the loss of mass books"**

B. Does the editorial concept offer an improved channel of communication to an important (i.e. hard to reach) market segment or target audience?

C. Can the editorial concept be sustained for more than a few issues?

D. Does the new publisher have sound and reputable financial and editorial credentials?

E. Does the new publication offer reasonable rates vis a vis magazines of similar circulation size and audience profile?

F. Does the magazine represent a low financial risk to an advertiser (e.g., a charter rate)?

G. Does the editorial concept relate to current brand marketing and creative strategies?

Astute business people launched *New Times, Good Food, Panorama, Your Place, Viva, Intellectual Digest, Human Behavior* and the *"197[illegible] Look"* . . . and others started new city magazines where there already was

MARKETING &
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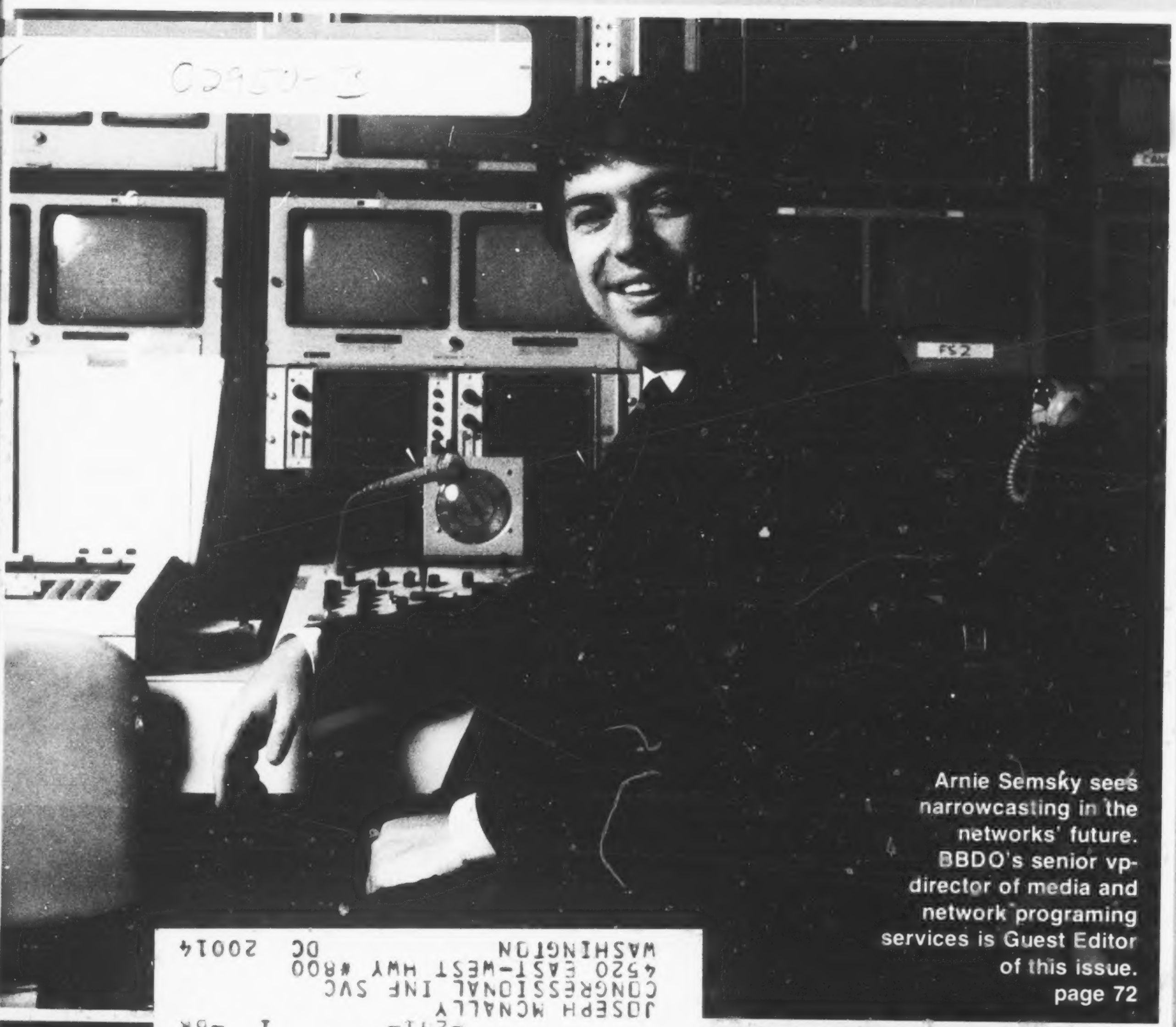

Arnie Semsky sees narrowcasting in the networks' future. BBDO's senior vp-director of media and network programing services is Guest Editor of this issue.
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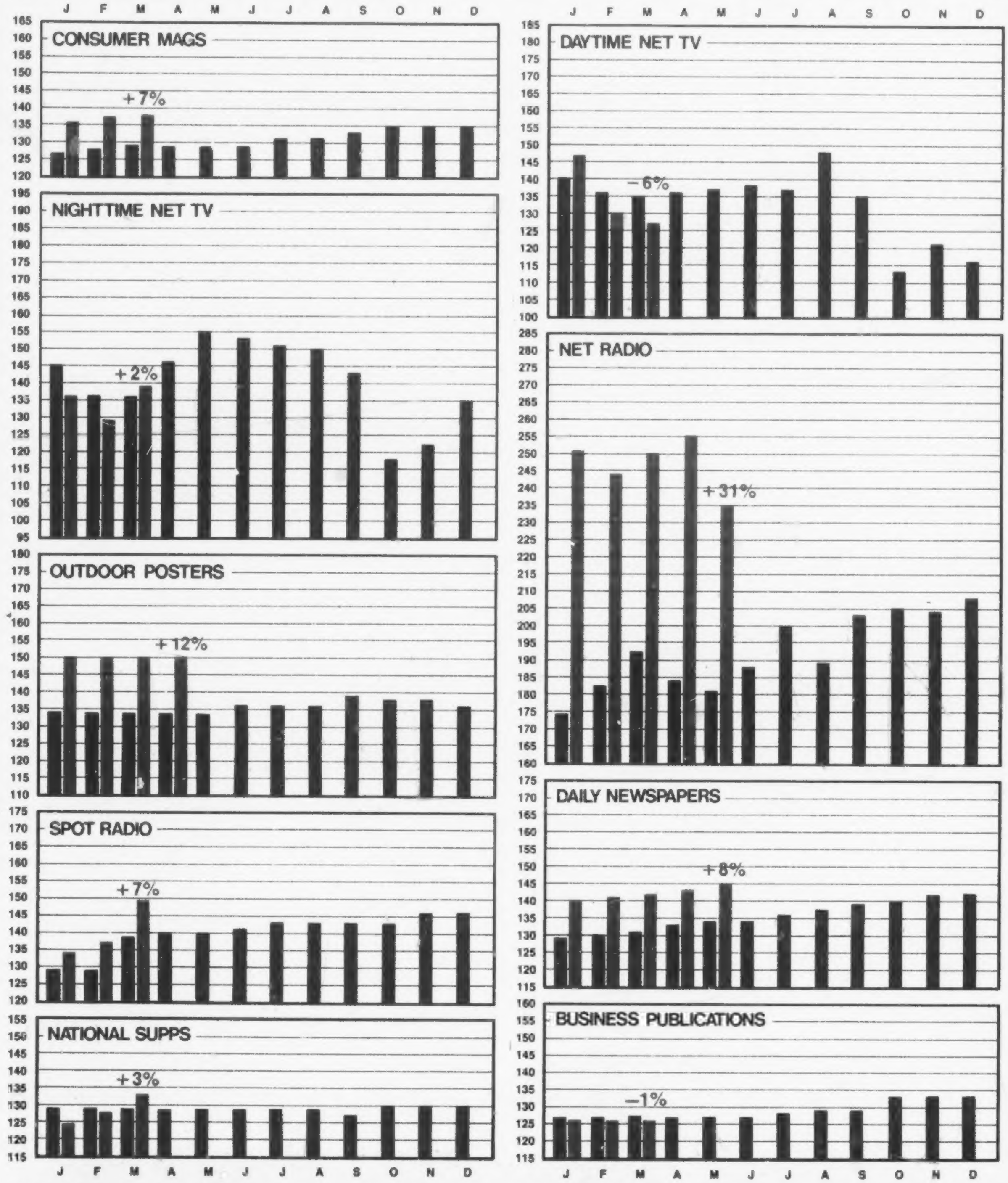
MEDIA COST INDEX

Black bars index for 1980; red bars 1981; base year 1977



The Media Cost Index reflects reported trends extracted from available published sources. This analysis uses standard competitive report sources to develop comparable costs that reflect monthly cost trends by medium. Where industry competitive sources are unavailable, selected cost data from SRDS are sampled. Sources: **Nighttime Network TV** — cost per average 30-second spot 7:30-11 p.m. Monday-Saturday and 7-11 p.m. Sunday from Broadcast Advertisers Report Network TV Service. **Daytime Network TV** — cost per average 30-second spot 10 a.m.-4:30 p.m. Monday Friday from Broadcast Advertisers Report Network TV Service. **Network Radio** — cost per average 30-second radio announcement from Broadcast Advertisers Report Network Radio Service. Index 100 for Nighttime network tv, daytime network tv and network radio are for each month in 1977. **Spot radio** estimates are based on SRDS cost of one minute on one station per market in the top 50 RADI markets. **Consumer magazine** estimate based on reported SRDS cost of page, 4-color in 30 national consumer magazines based on circulation. **National Supplements** estimates based on reported SRDS cost of page, 4-color for

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COST TRENDS
a Decisions analysis

Broadcast cost indices on the page opposite have been revised by Broadcast Advertiser Reports, which has updated the data to the base year 1977. So these (except for spot radio) are completely new in all respects.

Index 100 now for nighttime network television, daytime network television and network radio are for each month in 1977. They are set by a new BAR review of the cost of 30 second announcements in each of these media in each month in that year.

The black bars are an extension of those indices by the month to 1980. For example, the nighttime net tv index for March 1980 is 136 — indicating that 30-seconds on net tv nighttime in March 1980 cost 36% more than in March 1977.

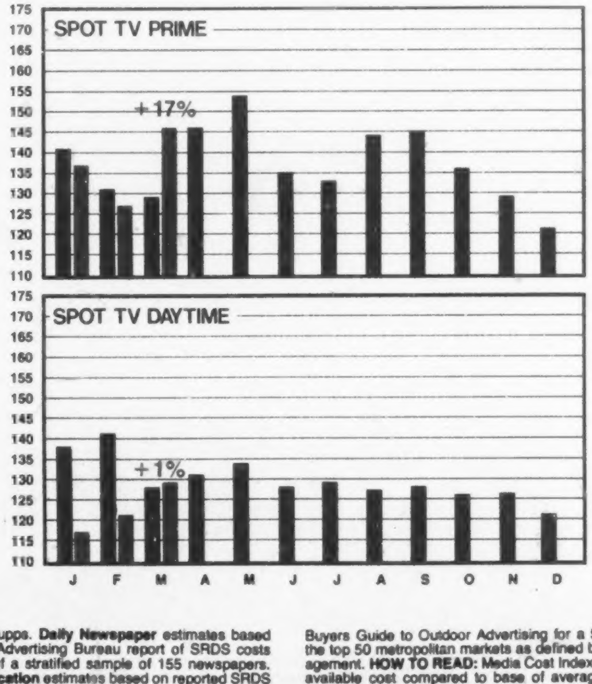
The red bars are a further extension of the indices to 1981. For example, in March 1981 the index is 139 — indicating that 30 seconds on net tv nighttime cost 39% more than in March 1977 — up 2% from 1980.

The same relationships hold true for daytime net tv and network radio. The base is always the comparable month in 1977, with the bars truncated to fit as many into the page as possible.

Spot tv, shown above, is based on BAR data. It shows a dip in prices for the early part of the year, and the beginning of a rebound in March to levels above the previous year.

The new indices do not match those previously published in *Decisions* because of changes in both definition and source. Previously they were supplied by J. Walter Thompson. Now they come direct from BAR.

New definition for nighttime net tv is primetime cost of average 30-second tv spot 7:30-11 p.m. Monday-Saturday and 7-11 p.m. Sunday on the networks as estimated by BAR's Network TV Service.



three national supps. **Daily Newspaper** estimates based on Newspaper Advertising Bureau report of SRDS costs per agate line of a stratified sample of 155 newspapers. **Business Publication** estimates based on reported SRDS cost of a page, 4-color for 48 magazines representing 42 business and professional classifications. **Outdoor Posters** based on IOA reported card costs extracted from the Buyers Guide to Outdoor Advertising for a 50-showing in the top 50 metropolitan markets as defined by Sales Management. **HOW TO READ:** Media Cost Index reflects latest available cost compared to base of average year 1977. Percent change reflects annual rate of change and is based on latest available month costs compared to same month in previous year.

The

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854

qualified recipients of Marketing & Media Decisions

●

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●

Marketing & Media Decisions

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●

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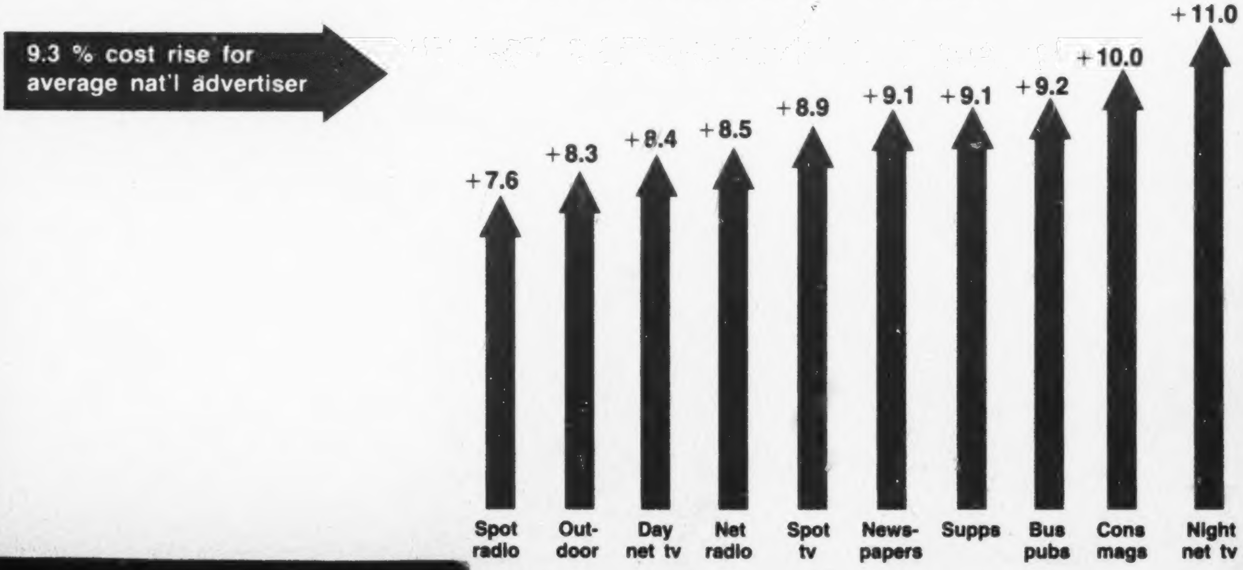
MARKETING &
MEDIA Decisions
August 1981 / Volume 16, No. 8

Media costs will rise 9.3% in '82

PART 1 of this report shows that unit costs for the average national advertiser will rise 9.3% in calendar year 1982. This is based on a *Decisions* survey of top agency media directors and media researchers. PART 2, immediately following, gives the cost track record as estimated by Joyce Geller Romley, media supervisor in the media analysis and information division of Ted Bates. Her analysis shows that individual media unit costs have doubled in some cases, tripled in others since 1970.

% cost rises forecast for 1982



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Media Costs
Part I

Media prices will rise almost as much in 1982 as they have this year.

In calendar year 1982 costs will be up 9.3% for the average national advertiser — compared to a 1981 rise of 9.9%. Advertisers who split their media budgets in accordance with the national average had to increase their appropriations by 9.9% this year in order to use the same schedules and same media as in 1980. Next year they'll have to up their budgets another 9.3%.

Inflation in the media process as well as in the other elements in the economy continue to run ahead almost unabated.

Nighttime network tv will continue to lead the pack in 1982, according to a *Decisions* panel of media and research experts — expected to be up 11.0% next year. There has been enough upfront buying to make both sellers and buyers confident of strong price advances. Spot tv is expected to trail nighttime network, with a price advance in 1982 of 8.9%. Daytime net tv is estimated for next year to accomplish a relatively moderate price rise of 8.4%.

Consumer magazines are also anticipated to get away with good price hikes — forecast to rise 10.0% in 1982.

Newspapers, supps and business publications are in the middle range of price hikes — forecast to rise 10.0% in 1982.

Radio is at the low end of the spectrum, if our prognosticators for next year are on target. They say net radio will get 8.5% more for its units in calendar year 1982 — and spot radio 7.6% more.

Outdoor's price increase in 1982 will be a modest 8.3%.

The tables on these pages tell the complete story for the current year, and for 1982. On the left are the tables for 1982 showing unit cost increases, increases in audience, estimates of costs per thousand. On this page are the tables for the current calendar year 1981, as reported at approximately mid-year. Averages are shown at the top in each table, and the range in·

Anticipated media costs rises: 1982 vs. 1981

	unit cost	audience	cpm
Average increases			
Nighttime network tv	+11.0%	+1.0%	+10.0%
Daytime network tv	+8.4	±0.0	+8.4
Spot tv	+8.9	+0.5	+8.4
Network radio	+8.5	+1.0	+7.5
Spot radio	+7.6	+0.7	+6.9
Consumer magazines	+10.0	+0.2	+9.8
Sunday supps	+9.1	+0.2	+8.9
Daily newspapers	+9.1	+0.4	+8.7
Outdoor posters	+8.3	+0.6	+7.7
Business publications	+9.2	+0.2	+9.0
Range in forecasts (the highs and lows)			
Nighttime network tv	+6 — +15%	−5 — +6%	+5 — +15%
Daytime network tv	+5 — +11	0 — +1	+8 — +10
Spot tv	+5 — +13	0 — +1	+5 — +13
Network radio	+5 — +12	0 — +2	+4 — +10
Spot radio	0 — +10	0 — +3	0 — +10
Consumer magazines	+8 — +12	−1 — +1	+8 — +12
Sunday supps	+9 — +11	0 — +2	+5 — +12
Daily newspapers	+6 — +11	−1 — +2	+6 — +11
Outdoor posters	0 — +11	0 — +3	0 — +11
Business publications	+8 — +11	0 — +1	+6 — +12

Source: Decisions survey among leading advertising agencies.

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forecasts of the *Decisions* panel at the bottom.

For example, in 1982 nighttime network tv vs. 1981, the average of the forecasts pegs the change at +11.0% for unit costs, +1.0% for audience, and +10.0% for cpm. The range in estimates for unit costs rises ran from +6 to +15%, in audience from −5 to +5%, and in cpms from +5 to +15%.

Significantly, all media are expected to show considerable price advances. And the difference between the fastest escalating media and the relatively slower price hikers is not very great. Advertisers will not be able to shift their media mixes to any appreciable extent in order to escape media inflation.

In this report last year we pointed to the expected strength for newspaper and consumer magazine pricing in the year ahead, and that applies again this year. Credence is given to the continued pricing strength of these media by the fact that we were almost on target in last year's predictions.

When we compare average unit price hikes as predicted by our panel last year with current actuals, this is what we find:

	predicted last year	actual this year
Night net tv	+11%	+9%
Day net tv	+9	+9
Spot tv	+9	+9
Net radio	+8	+9
Spot radio	+8	+9
Magazines	+9	+10
Supps	+9	+9
Newspapers	+10	+10
Outdoor	+10	+9
Bus. pubs.	+9	+9

The panel did quite well, coming within two percentage points in each case. The one real difference was in nighttime network tv, where the expectation was an 11% price rise, which is now coming in at 9%. It is difficult – particularly with the negotiated media – and the next year is a long way off. But the estimates for next year should be as close as those indicated above.

Part two of this report, a track record supplied this year by Ted Bates, does not include business publications. So we have pulled together the best

Continued on page 122

Actual media cost rises: 1981 vs. 1980

	unit cost	audience	cpm
Average increases			
Nighttime network tv	+9%	+2%	+7%
Daytime network tv	+9	+2	+7
Spot tv	+9	+1	+8
Network radio	+9	+3	+12
Spot radio	+9	+1	+8
Consumer magazines	+10	0	+10
Sunday supps	+9	0	+9
Daily newspapers	+10	0	+10
Outdoor posters	+9	+1	+8
Business publications	+9	0	+9
Range in forecasts (the highs and lows)			
Nighttime network tv	+5 — +16%	−5 — +2%	+1 — +14%
Daytime network tv	+8 — +11	0 — +5	+3 — +10
Spot tv	+5 — +15	0 — +2	+4 — +15
Network radio	+2 — +15	0 — +1	+11 — +14
Spot radio	+6 — +12	0 — +1	+5 — +11
Consumer magazines	+6 — +12	0 — +1	+8 — +12
Sunday supps	+5 — +12	0 — +2	+5 — +12
Daily newspapers	+5 — +12	−5 — +2	+5 — +17
Outdoor posters	0 — +16	−6 — +2	0 — +11
Business publications	+8 — +11	0 — +2	+7 — +10

Source: Decisions survey among leading advertising agencies.

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MEDIA COSTS (from 61)

past estimates and added the current figures supplied by our cost panel. Here is the resulting long-term index of business publication costs trends, with index 100 taken as 1970 in order to match the newly supplied Ted Bates data:

Year	Index	Year	Index
1960	60	1971	108
1961	62	1972	119
1962	67	1973	125
1963	70	1974	130
1964	73	1975	139
1965	77	1976	155
1966	81	1977	165
1967	84	1978	177
1968	91	1979	192
1969	96	1980	210
1970	100	1981	229
		1982	250

In order to estimate cost increase for the average national advertiser, the cost advances for major media were weighted by relative volume of total national advertising in major media as estimated by Bob Coen of McCann-Erickson as follows: network tv 30%, spot tv 19%, network radio 2%, spot radio 4%, consumer magazines and supps 14%, outdoor 2%, business publications 10%. On this basis, as shown in the chart below, the average national advertiser, in 1982 in order to maintain media schedules in 1982 will have to spend 176% more than he did in 1970.

Howard Lelchuck, vp-media director, Kenyon & Eckhardt, added a wise proviso when he filed his contribution to this report: "Whenever I am asked what the cost increase will be, I add a preamble because the number you, I and all other 'media gurus' give out is the *average* cost increase. This is not the number all planning people should be using.

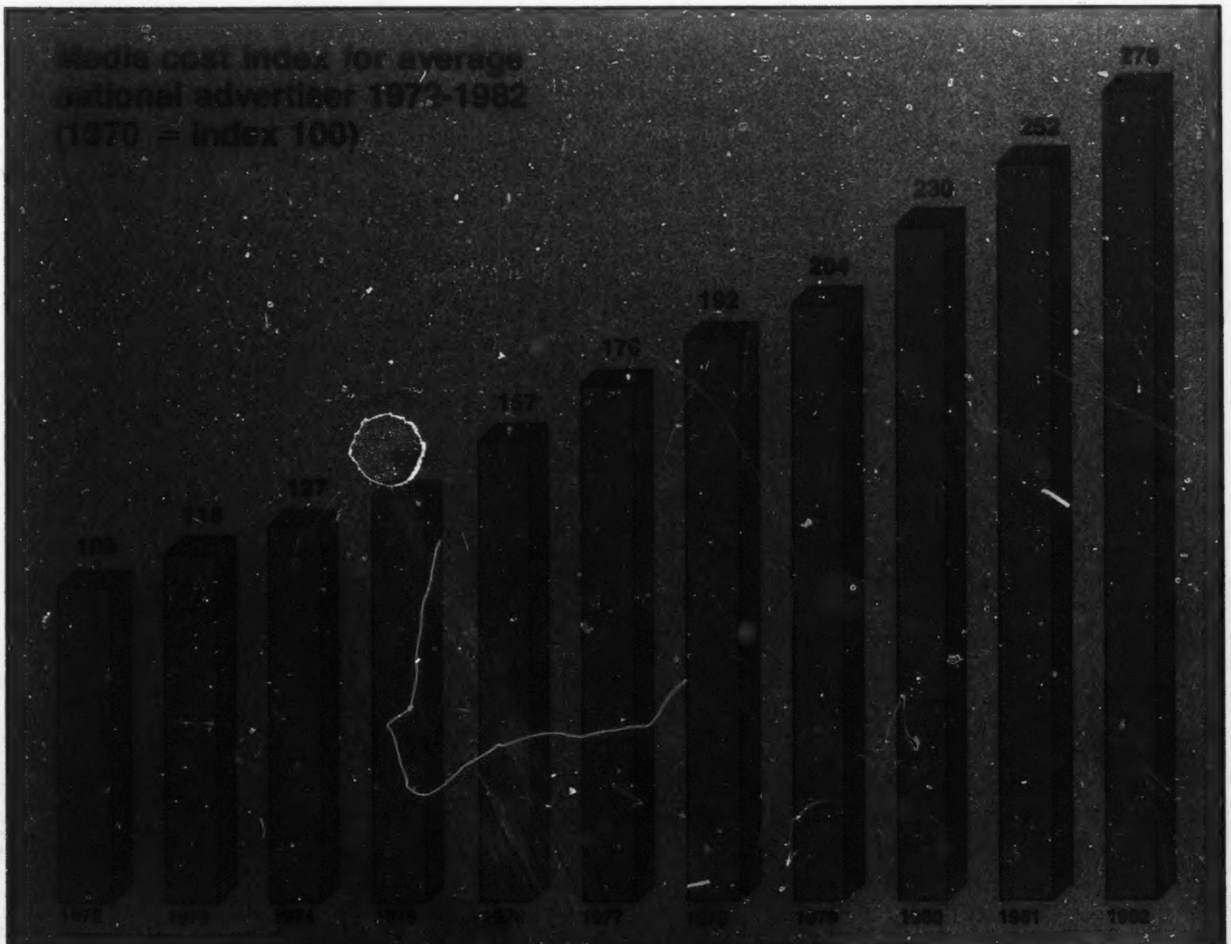
"Each account plans individually and, therefore, buys differently because of various objectives — namely, quantity vs. quality; long lead time vs. last minute implementation, low level of weight vs. maximum weight levels; scatter buys vs. sponsorship, etc.

"All of these lend themselves to a higher or lower cost than the average."

Adds Henry Platek, vp-marketing services, Carr Liggett, Cleveland: "Media rates will continue to climb at about the same rate as inflation. Tv will continue to try to get 'all the traffic will bear,' but network and spot tv are in for a let-down, beginning next year as cable, cassette, games and independents get stronger.

"Print will go up as postage, printing and paper costs go up. Audience (circulation) will have small increases. Thus cpm's will rise."

Sheldon Taule, vp-media, VanSant Dugdale, Baltimore said: "Outdoor audience will increase because of comparable increases in automobile traffic to levels of two-three ago." ■



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The track record

Joyce Geller Romley, media supervisor at Ted Bates, media analysis and information division in New York, prepared the following report on media cost trends from 1970 through 1981. She has added to it an analysis of why costs have moved as they have for the major media, and how advertisers have kept pace.

Ted Bates and Company has, for several decades, prepared an annual media trend analysis. This yearly study tracks advertising expenditures, costs, audiences and cost efficiencies from 1970 through 1980 for informational purposes. However, we will focus on 1976-1979, the period that we depict as the media "boom years."

Next, our attention will be directed to examining media trend developments in 1980 versus 1979, and the consumer price index (CPI), an accepted measure used to describe the rate of inflation, will be used to compare media efficiencies.

As our final step, we will provide estimates for the way 1981 will wind up.

Media efficiencies increased more rapidly than the over-all inflation rate during the latter part of the seventies. The higher-than-average pricing was due to continued strength in advertising demand, a trend that emerged in the late 70's.

In presenting this information, it is beneficial to compare it within specific media elements. During this four year period, television displayed the largest average yearly cpm increase: day network tv up 17%, evening network tv up 14%, spot tv up 10%.

Both network and spot radio cpm's were up 8%.

In print media, consumer magazines increased 7% and supplements 8%.

Newspaper cpm increases were continuous over these four years, with an average 9% yearly increase.

The consumer price index accelerated at an 8% average annual rate. This clearly indicates that the television medium increased costs at rates far exceeding the growth of inflation during 1976-1979, while all other media paralleled the CPI increase.

Since the advertising industry does not operate in an isolated environment, we have compared general trends of media expenditures within the broader scope of the national economy. Not only did media efficiencies increase during the years of 1976-1979, but advertising revenues also grew faster than the U.S. economy. The figures for the four-year boom period reflect an annual 15% increase for ad volume as compared to 12% for the GNP. In 1980, however, both ad volume and the GNP had 11% increases over the previous year.

Last year

In 1980 *national* ad dollars gained 12% over 1979 paralleling other inflationary increases of the economy. Network tv has remained the leader in national ad expenditures, 33.5% of the total. Network radio registered the largest gain in 1980 — up 15% over last year. Continuing the trend of the past few years, 1980 was a fine growth year in terms of national advertising activity.

Media cpm's in 1980 continued to rise, but not as rapidly as in recent years. The only exception was evening net tv where the classic supply and demand effect was in operation. This was due to a sell-out in a year of Winter Olympics and presidential election specials, where evening network led the way with a 14% increase. Day net tv ranked second with an 11% gain. The softening in spot tv led to an 8% increase for 1980. Possibly, tv rate increases were moderated because many advertisers experimented with less tv, (through flighting or shorter market lists) or with a mix of tv with larger proportions of other media.

Network and spot radio's cpm performance in 1980 (+5% and +7%)

Year-to-year change in costs per thousand

Broadcast	1976	1977	1978	1979	76-79
Day net tv	+25%	+29%	+8%	+5%	+17%
Eve net tv	+8	+26	+0	+12	+14
Spot tv	+25	+5	+10	+8	+10
Net radio	+10	+9	+7	+6	+8
Spot radio	+12	+9	+5	+5	+8
Print					
Magazines	+2	+9	+9	+8	+7
Supplements	+3	+19	+2	+8	+8
Newspapers	+10	+9	+8	+9	+9
Outdoor					
Posters	+6	+9	+11	+12	+9
Consumer Price Index	+6	+7	+8	+13	+8

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were considerably below the CPI of 12%. Consumer magazines might have profited from the erratic fluctuations in pricing of the negotiated media (tv and radio) in 1980. However, they were also subject to the most obvious cost problems of their own.

Current year

As media costs rise, media plans must be modified, and each medium has to be reevaluated. Consequently, cpm forecasts play a vital role in the media planning process.

Keeping this in mind, we anticipate moderate cpm increases in network tv; 4% for day, and 7% for evening by year end 1981. Spot tv should also achieve a moderate increase of 5%, while network and spot radio should experience the same increases in cpm as 1980, 5% and 7% respectively. Magazine and outdoor cpm's should still parallel the CPI with increases of 11% each, while newspapers and supplements should lag behind with an 8% and 9% cpm increase respectively.

1981 media prices are still rising in spite of economic uncertainties, but at significantly lower rates than the CPI. We are forecasting a welcome relief for 1981 — with virtually all media elements posting increases below the projected CPI.

Data bases

Tables report trends in index form, with 1970, the base year, indexed at 100. These estimates are based on unit costs of 30 seconds for tv and network radio, 60 seconds for spot radio, one page four-color four magazines, mil-

Total advertising volume and gross national product

	Ad volume		GNP		
Year	Millions	Yr. to yr. % change	Billions	Yr. to yr. % change	Ad volume as % of GNP
1976	$33,720	+19%	$1,706.5	+12%	1.98%
1977	38,060	+13	1,889.6	+11	2.01
1978	43,840	+15	2,106.6	+12	2.08
1979	49,520	+13	2,368.5	+12	2.09
1980	54,750	+11	2,628.8	+11	2.08

Total national advertising — 1980

		% of total	vs. Year Ago
Network TV	$ 5,105,000,000	33.5%	+11%
Spot TV	3,260,000,000	21.4	+14
Network Radio	185,000,000	1.2	+15
Spot Radio	750,000,000	4.9	+14
Magazines	3,225,000,000	21.1	+10
Newspapers & Supplements	2,335,000,000	15.3	+12
Outdoor	400,000,000	2.6	+13
	$15,260,000,000	100.0%	

Per cent average yearly increases in cpm

Broadcast	76-79	1980	1981
Day net tv	17	11	4
Eve net tv	14	14	7
Spot tv	10	8	5
Net radio	6	5	5
Spot radio	8	7	7
Print			
Magazines	7	11	11
Supplements	8	9	9
Newspapers	9	9	8
Outdoor			
Posters	9	11	11
CPI	8	12	11

NATIONAL DOLLAR EXPENDITURE TRENDS

	Network tv	Spot tv	Magazines	Newspapers/ supplements	Spot radio	Net radio	Outdoor
1970	100	100	100	100	100	100	100
1971	96	93	106	111	106	112	112
1972	109	107	111	124	108	132	125
1973	119	112	112	125	108	121	130
1974	129	121	116	134	109	123	132
1975	139	132	113	137	118	148	143
1976	172	175	138	169	140	188	164
1977	209	179	167	188	147	245	188
1978	240	209	201	201	167	262	199
1979	277	233	227	254	178	288	231
1980	308	264	250	273	202	331	261

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line black and white for newspapers, one page black and white for supplements and 100 showing for outdoor.

Audience levels and cpm's are based on women 18+ for day network; total persons 2+ for evening network; tv households for spot tv; persons 12+ for radio; circulation for magazines, newspapers and supplements; and total population for outdoor.

Sources for audience information are: Network and spot tv — A.C. Nielsen; network radio — "RADAR"; spot radio — Arbitron; magazines — Magazine Publishers Association; newspapers — Newspaper Advertising Bureau; supplements — Standard Rate and Data; outdoor — Outdoor Bureau and estimates. Figures for 1981 are Ted Bates' estimates. *Joyce Geller Romley*

Cost trends 1970-1981 (1970 = index 100)

	Day net tv	Eve net tv	Spot tv	Magazines	Newspapers	Supplements	Spot radio	Net radio	Outdoor	Consumer price index
UNIT COST TRENDS										
1970	100	100	100	100	100	100	100	100	100	100
1971	94	96	102	100	104	99	106	111	108	104
1972	98	109	95	97	107	102	112	117	119	108
1973	113	124	95	97	114	109	119	119	123	114
1974	121	137	100	102	130	121	124	117	134	127
1975	140	147	102	107	144	131	132	123	144	139
1976	163	160	130	110	159	135	151	129	156	147
1977	204	203	137	119	173	156	166	148	172	156
1978	227	228	140	130	190	168	179	159	191	168
1979	247	256	160	140	205	183	193	171	212	190
1980	279	300	179	156	226	201	213	195	237	214
1981	296	324	192	173	248	221	231	207	263	238
AUDIENCE TRENDS										
1970	100	100	100	100	100	100	100	100	100	
1971	107	103	104	99	100	98	104	112	104	
1972	116	110	103	97	101	99	104	132	107	
1973	119	111	105	98	102	102	111	134	108	
1974	115	112	108	99	100	104	113	132	108	
1975	127	120	110	97	98	108	114	136	110	
1976	119	120	112	97	98	108	117	130	111	
1977	116	121	112	96	99	106	119	136	112	
1978	119	125	115	96	100	112	121	138	113	
1979	123	125	121	96	100	112	124	139	113	
1980	126	128	125	96	101	113	128	151	115	
1981	128	130	127	96	102	114	130	153	116	
COST-PER-THOUSAND TRENDS										
1970	100	100	100	100	100	100	100	100	100	100
1971	87	93	98	101	104	101	102	99	104	104
1972	84	99	92	100	107	103	108	89	111	108
1973	95	111	91	99	112	107	108	89	114	114
1974	105	120	93	103	130	116	109	89	123	127
1975	110	122	93	111	147	121	115	90	131	139
1976	137	133	116	113	161	125	129	99	140	147
1977	177	167	122	123	175	148	140	108	153	156
1978	191	182	122	135	190	150	148	116	169	168
1979	200	205	133	146	205	163	155	123	188	190
1980	222	232	144	162	224	178	166	129	208	214
1981	231	249	151	179	243	194	178	135	228	238

Photo: John Decold

Wine marketers reduced advertising spending last year although the category expanded a remarkable 7%. However, 1981 and '82 promise to be up years for wine advertising as vintners prepare new low calorie light wines and take advantage of a growing wine-consuming consciousness in the United States.

California versus the world.

That's the story of wine marketing in the U.S. as the decade of the 1980s unrolls — and wine marketers clamor and contend for a bigger share of an ever-growing thirst.

Last year was up-and-down, as consumption climbed by 7% and advertising expenditures took a 4% tumble. The distilled spirits industry newsletter *Impact* detailed 1980, with its record wine shipments of 476 million gallons as "a year of strong growth for the U.S. wine market as the American wine drinking public came of age."

1980 was definitely the year in which wine was on the move. For the first time since shipments records have been kept, wine surpassed distilled liquor in shipments in the U.S. According to *Impact* wine shipments totaled 475.8 million gallons, a 7.1% increase over 1979. Liquor shipments totaled 455 million gallons, down 3.7% over 1979.

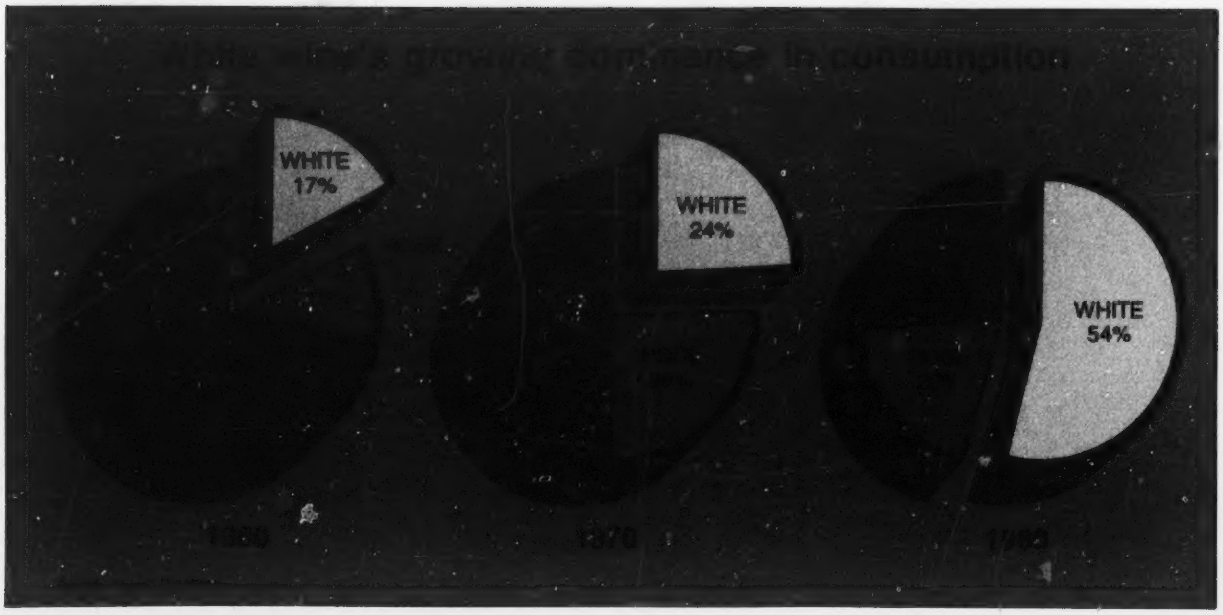
But in terms of advertising dollars, a steady march into bigger budgets was halted as several large vintners and importers retrenched, among them Seagram's Paul Masson, United Vintner's Colony, and Schieffelin's Blue Nun.

Some of these trends reflect a readjustment in the balance between California and other states' production, as well as domestic versus imported vintages.

According to *Impact,* California wine producers strengthened their already crushing grip on domestic production, shipping 338.8 million gallons, (71% of the U.S. total and an 8% increase over the previous year). Meanwhile, imports shipped 102.1 million gallons in the U.S. market last year — and racked up an 11% increase.

Domestic shipments from states other than California fell to a mere 7% of the U.S. total as California wines became the predominant choice.

Consequently, the wine marketing battle shaped up primarily between the well-financed vintners of California and the major importers of the numerous labels from Italy, France, Germany and Spain. The wine marketers in the best position, such as Heublein and Seagram, have wines of both California and European origin.



White wine's growing dominance in consumption

But while all this is going on, another segment is opening up in the wine market, the light category. The success of Banfi's Riunite, an Italian slightly sparkling, less alcoholic wine, alerted U.S. producers to the potential market for low calorie, less alcoholic wines. And a decision by the Federal Bureau of Alcohol, Tobacco and Firearms to allow the use of the term light in February in wine labeling has opened the door to further segmentation of the market.

Beringer introduced Los Hermanos last year, a wine it designated as "soft." Geyser Peak, also a California winery, followed shortly thereafter with a soft Johanesberg Riesling. But the real battle is expected this year, as Coca Cola's Taylor California Cellars tests its Light Chablis in 12 markets across the country.

Peter S. Sealey, vp-marketing and planning at Wine Spectrum, the Coca Cola wine marketing arm, comments on the development of light wines: "That wine is going to do for the wine business what diet sodas did for the soft drink business and what light beers did for the beer business."

These factors suggest that a decline in ad spending (down from $126.7 million in 1979 to $122.1 million last year) was probably a temporary hitch to allow wine marketers to catch their breath for some major media battles in the coming years.

The profile of wine consumption in the U.S. has been shifting sharply. White wine became the public's newest darling in the past decade while red and rose wines languished in relative neglect. Since 1970, white wine's market share more than doubled, soaring from 24% in 1970 to 54% last year. During the same period, red wine's share plummeted from 50% to 26%, and rose's from 26% to 20%.

Naturally, most of this can be blamed on California. Marvin Shanken, publisher of *Impact*, observed: "An examination of America's table wine color mix by place of origin reveals that the white wine phenomenon was clearly launched from California. Beginning with 1960, each successive 10 year period shows California white wine doubling its market penetration."

Shanken also holds California responsible for the demise of red wine's

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popularity in the same period: "Since 1960, California reds' penetration has dropped from 51% of the total table wine market to only 14% in 1980. Red table wines from other states matched this poor performance, down from 15% of the market in 1960 to only 2% last year.

At the same time, imported white wines were gaining in popularity, he notes, to triple their market share in the past 10 years. Italian white wines have done particularly well, accounting for 57% of their market share last year, while red took 42% and rose 11%.

Creative in wine advertising is veering towards connoisseur endorsement. Gallo and Taylor are taking that approach for several of their varietals. Taste tests are also popular, as well as name spokesperson presenters, such as Orson Welles for Paul Masson and fashion designer Bill Blass for Almaden champagne.

Network television continues to be the favorite medium of wine marketers, followed by spot tv and magazines. Spot radio is a mainstay for imported brands with limited distribution and tight budgets.

Newspapers have been getting more wine ad dollars since many have instituted wine columns on best food day.

Here's how the major wine marketers are getting their messages to the public in 1981.

Gallo

Ernest and Julio Gallo continue to dominate the media in wine advertising, collectively spending for their brands nearly 20% of the industry total. But big as the Gallo operation is, it isn't rushing into the fast breaking light wine category. Rather, the Gallos are gradually working their way up into the premium wine categories.

While Taylor, Beringer and Geyser Peak are hurrying into the light wine business, the Gallos are taking a wait-and-see stance. Even those vintners already committed to the marketing of a light wine concede production is tricky. The grapes must be picked while unripe to keep sugar content low. A miscalculation of only a few days could eliminate a pressing for light wine.

So Gallo contends it will be some time before the technology is developed to make a light wine up to its standard. "There would be little satisfaction to the consumer or to us to make a wine from unripe grapes," Ernest Gallo said. But that doesn't mean the Gallos aren't working on it.

Earlier this year, the Gallo Winery released the first product of its new oak aging cellar, less than 20,000 cases of a premium Chardonnay. It was distributed in metro areas of California, and in Denver, Chicago and New York City. No advertising was placed behind this premium offering. Terry Robards, the wine columnist for the New York *Times* commented: "It represents only a tentative step into the world of premium wines, the kind of cautious step that Gallo no longer need take."

Late this year or early in 1982, Gallo will release a premium Zinfandel and a Sauvignon.

This premium effort generally adds to the prestige of the Gallo name and undoubtedly will rub off on the varietals that it has been heavily advertising recently. The latest Gallo network television flight was in support of its Hearty Burgundy and Chablis Blanc. Slogan for the campaign: "The more you know about wine, the better you like Gallo."

Top ten imported table wine brands
(2.4 Gallon Case Depletions)

Rank	Brand	1979 (000)	1980 (000)	Change
1.	RIUNITE	6,550	9,070	+38%
2.	CELLA	1,920	2,370	+23
3.	GIACOBAZZI	1,790	2,340	+31
4.	BOLLA	1,375	1,530	+11
5.	FOLONARI	1,300	1,470	+13
6.	YAGO	1,100	1,330	+21
7.	BLUE NUN	1,200	1,260	+5
8.	MATEUS	1,200	1,240	+3
9.	ZONIN	860	1,090	+18
10.	LANCER'S	790	790	—
Total		18,075	22,490	+24%
Share of total wine market		9.8%	11.3%	
Share of imported table wine market		53.8%	51.6%	

Source: Impact Databank

10 top ranking U.S. wineries

Winery	Millions of gallons shipped	1979 shipments	Percent change
E. & J. Gallo	121.8	113.2	7.6%
United Vintners	58.5	55.1	–5.8%
Almaden	32.1	28.7	11.8%
Wine Spectrum	22.4	16.3	37.4%
Wine Group (Coca Cola)	21.8	20.7	5.3%
Paul Masson	17.5	14.9	17.4%
Canandaigua	15.0	13.1	14.5%
Guild	14.7	15.6	–5.7%
Monarch	13.0	12.3	5.6%
Sebastiani	10.0	9.0	11.1%
Top 10 total	326.8	298.8	7.3%
Total U.S. wine shipments	475.6	444.1	7.1%

Source: Impact Databank

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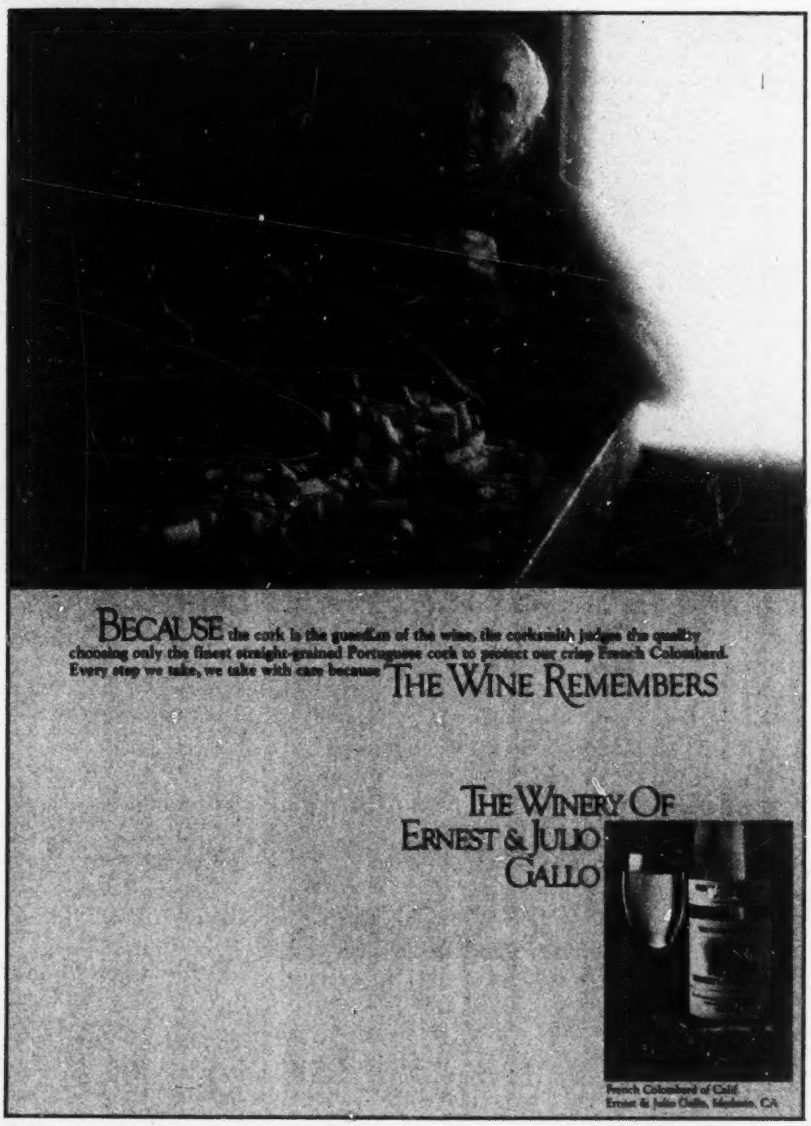

BECAUSE the cork is the guardian of the wine, the corksmith judges the quality choosing only the finest straight-grained Portuguese cork to protect our crisp French Colombard. Every step we take, we take with care because THE WINE REMEMBERS

THE WINERY OF ERNEST & JULIO GALLO

French Colombard of Calif.
Ernest & Julio Gallo, Modesto, CA

Gallo uses simple print ads that discuss the art of the winemaker in its four-color magazine campaign.

Media expenditures for the Gallo label soared from $17 million in 1979 to $22 million last year. Gallo continued its domination of network television with a $16 million expenditure last year, while maintaining a strong presence in magazines with its atmospheric, four-color pages focusing on the wine maker's art.

Gallo's Andre label was given comparatively short shrift with $2.2 million, most of it in network tv, and about 7% in spot television.

Among American vintners, Gallo appears well able to hold its media preeminence. In 1979, Gallo and Paul Masson came close to parity in media support, but last year Paul Masson dropped back, leaving Gallo the unchallenged leader.

Almaden

If this National Distillers subsidiary feels beleagured and picked-on, it has just cause. In the past two years, the high spending competition (excluding Gallo) chose Almaden as a prominent target in taste test commercials. And Almaden is getting ready to fight back. The primary brands gunning for Almaden have been Taylor and Colony.

Meanwhile, Almaden has been relying on development of its own prestige and position. For the past year and a half it has been utilizing the "confidence strategy" developed by its agency, Dancer Fitzgerald Sample. This spot tv and magazine campaign was directed at that segment of the audience which lacks self confidence in its ability to select the right wine brand.

A newer thrust is the Bill Blass spokesman campaign for Blanc de Blanc champagne, also running in spot tv and magazines. This campaign seeks to establish a prestige image for the brand overall, rather than sell champagne, which generally sells itself.

But with a new campaign for Colony's Classic Chablis, directly positioned against Almaden, future creative is likely to strike back against the taste test bandying competition.

Almaden continues to rely on spot tv mainly due to budgetary considerations. The feeling at the winery is that it better wait until sufficient funds are available to do network television thoroughly rather than do it ineffectively just for the sake of saying the brand is in network tv.

Meanwhile, a strong magazine campaign continues to supplement spot tv in laying down a national advertising base.

Colony

The yo-yo budgeting of this brand by United Vintners, a subsidiary of Heublein, always keeps the world of wine marketers guessing. After spending over $4 million in 1979, the brand dropped to a $229,700 budget last year. This year, it's back in the $6 million range, as the brand goes the taste-test route for its Classic Chablis.

Of course, for nearly a decade, the future for United as a Heublein subsidiary was in jeopardy due to Federal Trade Commission action to force a divestiture. But Heublein won, and is now ready to provide more substantial backing for United Vintners brands.

The new Colony spots began running on network television in May of this year, as well as in 23 spot markets. Free standing inserts were also used in Sunday newspapers. The newspaper advertising contains a coupon for an official wine-tasting kit for $6.99.

Taylor

Although not yet a challenger to Gallo in volume, Taylor California Cellars, from Coca Cola's Wine Spectrum, is moving ahead at an astonish-

USE THE GEORGIA GROUP AND COVER

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Buffalo's coming alive with new hotels, restaurants, theater. A waterfront renovation. A rapid transit system. New, light industry. And a hearty, active 1.7 million consumers with an effective buying income of over $11 billion a year.*

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Represented nationally by Story & Kelly-Smith, American Publishers' Representatives, Ltd., The Leonard Co. and Merwin Associates.
*Source: Sales and Marketing Management, Survey of Buying Power, 1980
**Source: Three Sigma '80

ing clip. Introduced in 1978, the brand has gained a solid foothold in a fiercely competitive market. Last year, according to vp-marketing and planning Peter S. Sealey, the brand was up 171%.

Taylor has been innovative in its marketing strategy since its inception. California Cellars brought taste-test advertising to the wine business in 1979, accompanied by shrieks of displeasure from the rest of the industry. Since then, competitors have adopted the tactic after court challenges were disqualified.

This year, Taylor sued the Bureau of Alcohol, Tobacco and Firearms to use the term "light" in labeling a wine. At the time of the decision, Wine Spectrum president Harry E. Teasley said, "This type of product segmentation becomes more and more necessary in meeting the demands of an increasingly knowledgeable and sophisticated American wine consumer."

And apparently, that isn't the end of it. Peter Sealey recently warned, "What we're trying to do is innovate and bring change to the wine industry, giving it new products and new reasons for being. We're going to revolutionize the wine industry. We are going to change how the American wine industry makes and markets its products."

Taylor's Light Chablis was rolled out to 13 markets in June: Albany, Atlanta, Chattanooga, Denver, Jacksonville, Memphis, Milwaukee, Nashville, Omaha, Orlando, Tampa, San Diego and Seattle.

Wine Spectrum market analysts suspect that the new Light Chablis will find 70% of its users among women, and most of it will be consumed away from the dinner table. The test market effort is expected to determine whether the new brand cannibalizes from the regular Chablis, if there are repeat purchases, and if the advertising communicates the low calorie message.

Ironically, the low calorie aspect of the light wines may not be a critical factor. That is the assumption made by Beringer for its Los Hermanos brand. Beringer's agency, Keye/Danna/Pearlstein, in its own research into the light wine audience, found that low calorie attributes were not important enough to put into copy. Instead, the playback the Beverly Hills agency received was that the smoother taste and lower alcoholic content were the product attributes that were most desirable.

Which positioning — low calorie or smoother taste — will prove to be the most effective? The course of the next year will tell.

Taylor's copy for Light Chablis reads, "Introducing your other wine," and stresses the low calorie attribute and describes use occasions. The Light Chablis contains 57 calories per 100 milliliters (3.38 oz.) as compared with 76 calories for the regular Chablis. The alcoholic content is down from 11.5% to 9.4%, a 20% reduction.

The campaign is targeted against a male/female audience that is active and health conscious. The primary demographic is 24 to 35, with a secondary demographic group up to 50.

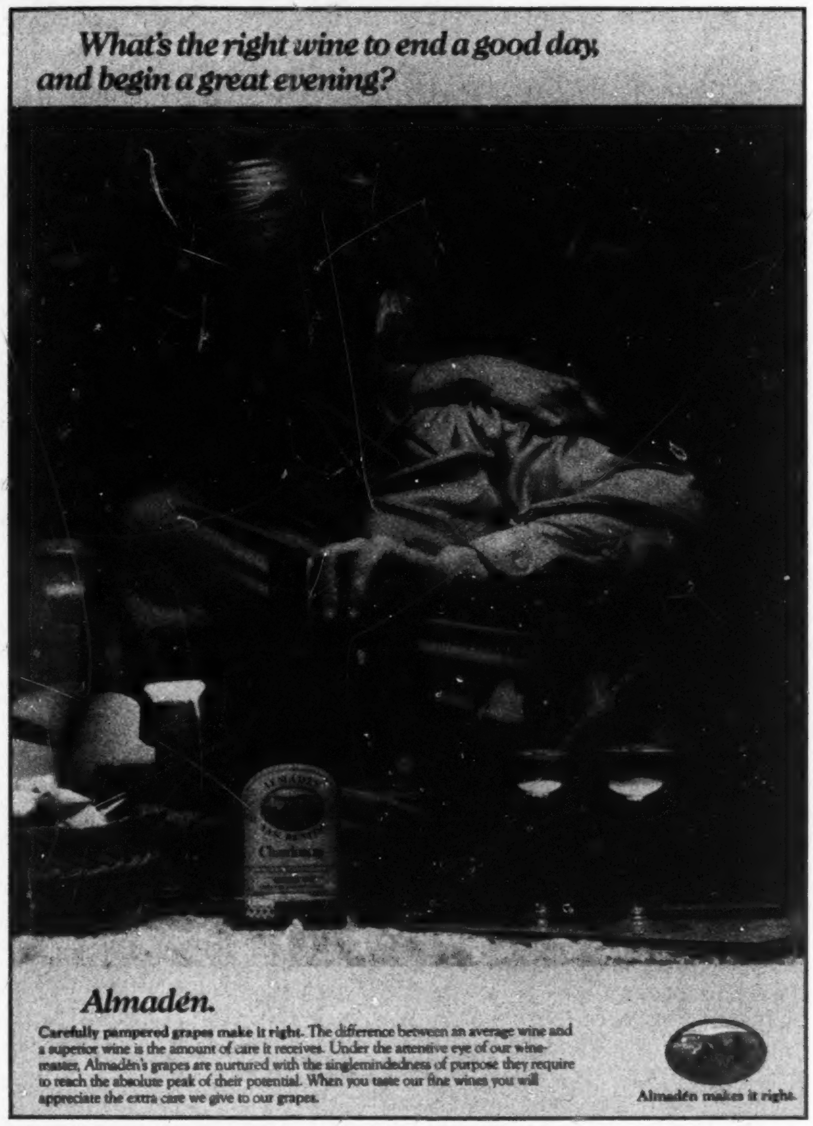
Newspapers and radio are the introductory media. Two-thirds pages are being run adjacent to wine columns in newspapers. On radio, 60 second spots are aired in drivetime. Light Chablis is also expected to benefit from the national network tv campaign for California Cellars' other varietals. Tv support for the new Light will be provided when it reaches one million case sales a year, which the Wine Spectrum estimates could be next year.

Meanwhile, Taylor introduced a new Dry Red and Dry White in May, and went national with the campaign for its six varietals first introduced in May of 1980.

According to Margaret Stern of the Wine Spectrum, magazines will be the primary medium for California Cellars this year, augmented with the occasional use of television and newspapers. Copy will focus mostly on an endorser theme, she said.

Taylor is also adding network radio to its media schedule, with the sponsorship of "James Beard's Kitchen," a two minute and twenty second program, on the CBS radio network. On it, Taylor will air five 30-second spots a week, plus opening and closing billboards.

The advertising dollar commitment, she added, "will be on par with anybody who is selling a lot of wine." That would suggest a budget in the $8 million to $10 million range, although a heavy reliance on print could bring that figure down to $6 million.



What's the right wine to end a good day, and begin a great evening?

Almadén.

Carefully pampered grapes make it right. The difference between an average wine and a superior wine is the amount of care it receives. Under the attentive eye of our winemaster, Almadén's grapes are nurtured with the singlemindedness of purpose they require to reach the absolute peak of their potential. When you taste our fine wines you will appreciate the extra care we give to our grapes.

Almadén makes it right.

Almaden positions itself as the right wine for those who may be uncertain in its series of magazine ads by depicting use situations.

Paul Masson

This Seagram California vintage brand, after a very strong media showing in 1979, with expenditures of over $17 million, slid back to just over $12 million last year. None the less, it was one of the more pervasive media presences last year.

The brand continued to use Orson Welles as its on-camera spokesman, intoning the maxim, "We will sell no wine before its time." Clearly, Paul Masson intends to establish a quality image by emphasizing painstaking winemaking procedures.

That theme is propounded mostly through network television, although a $1 million-plus magazine schedule also reinforces the message. Paul Masson's magazine budget is the third highest in the industry.

Last year, spot tv was just about eliminated as the budget shrank from $2,597,800 to a mere $3,200. It was that money that went into magazines.

Seagram policy forbids discussion of marketing strategy. However, Masson planners acknowledge that their strong presence in magazines is continuing in 1981.

Riunite

This phenomenal brand from Italy, marketed by the House of Banfi, reached the enviable position last year of accounting for 24% of all imported table wine sales. Riunite, a Lambrusco, sold 9,070,000 cases last year, up 38% from the 6,550,000 cases sold the year before.

Naturally, such results are stirring grand marketing designs for the future. Sandy Jamieson, Villa Banfi's marketing director said earlier this year, "Riunite's versatility has taken it beyond the traditional role of a wine and expanded its marketing opportunities as a thirst-quenching beverage. It is a wine suitable for any occasion and one that mixes well with every type of food."

Jamieson may also position Riunite against health buffs, mostly because it contains natural fructose, a high potassium count, and pectin, an anti-cholesterol agent. But the touting of these factors is illegal in wine ad copy.

Last year, Villa Banfi's investment in media for Riunite was $9,482,600, up from $7,421,900. This year, Villa Banfi says its media budget climbs to $14 million, with a bigger commitment to print and an expansion into radio.

The media budget increase was necessitated by the sales goal for Riunite in 1981: 12 million cases, the entire production of Riunite's 9,000 member cooperative. A part of that thrust is the development of a 6.3 oz. bottle called the "Cutie." Trade advertising will suggest the "Cutie" for salad bar display and restaurant usage. A four-pack is expected to encourage supermarket and retail sales.

In the 1981 media mix, television is getting $9,600,000, up slightly from last year's tv total. Network television will again get the emphasis.

Three new 30 second tv spots were developed by the Banfi agency, Hicks & Griest. Two are romantically humorous, and the third stresses quality.

An expanded magazine schedule focuses on up-scale magazines, sports books and some ethnic publications. One full page ad features Sharon Wright, "Miss Black America of 1980." A series of cartoons by Charles Saxon are also being used.

Jamieson's comment about the brand's expansion: "Consistently well-planned marketing over the years has helped Riunite's growth. But what's in the bottle is still the most important factor."

Cella

Another lambrusco that did well was Brown Forman's Cella. Growth for this brand was a strong 23%, from 1,920,000 cases to 2,370,000 — well behind Riunite in volume but still second among imported table wines.

Ironically, media expenditures for Cella were down last year, from $5,008,200 to $4,351,400. Most of the budget cut was made at the expense of spot television, which came down from $700,000 to $70,000 last year, according to Leading National Advertisers.

Considering the strength of the lambrusco category, B-F is likely to reinvest in Cella. New commercials for the brand were being shot in Italy by agency Manoff, Geer & Gross, which will probably air in late summer or early fall.

Brown & Forman says it plans its advertising on a fiscal year basis, and that any discrepancies between 1979 and 1980 are apparent rather than real.

Print hasn't been used by B-F for Cella in the past two years, and is unlikely to get on the schedule this year.

Bolla

The other strongly backed import from Brown Forman is Bolla, a Veronese wine from Italy. Like Cella, Bolla had a good year in 1980, and was up 11% from 1979, from 1,375 million cases to 1,530 million cases.

But while Cella's media support was diminished, Bolla's was increased. The Bolla budget went from $3,126,100 to $4,756,800. It also had a much more diversified media plan, with emphasis on spot tv rather than network. Magazines, newspapers and Sunday supplements accounted for 12% of the budget.

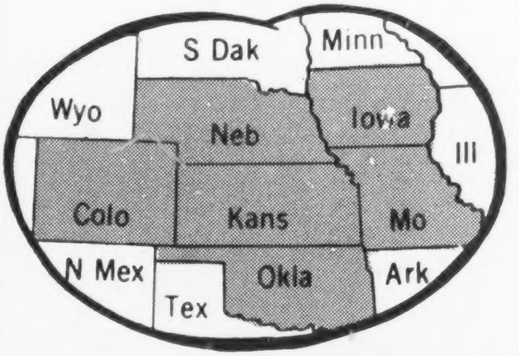
B&F says it's difficult decision to switch from national to local media for the brand, although the brand is national, is effective, but declines to discuss the reasoning behind the local strategy.

Possibly the B&F affiliate that manages Bolla, The Jos. Garneau Co., thinks that it is getting better efficiencies through spot buys than it would with a network schedule.

Fred Gardner

$26 Billion In Retail Sales
From 488 Non-Metro "C" & "D" Counties Where You Find
CAPPER'S WEEKLY
Right At Home
3RD Largest Newspaper Buy in the 6 State Region

- 6 States
  Kansas, Missouri, Nebraska, Iowa, Colorado and Oklahoma
- Immense Land Area
  455,754 Square Miles
- Few Urban Centers
  Only 27 Metro Areas



This is the region where small towns and rural areas contribute enormously to the massive dollar volume found in these 6 states.

	Non-Metro Counties	Percent Of 6-State Total
Spendable Income	47,331,434,000	38%
Retail Sales	25,973,302,000	37
Food Sales	5,795,274,000	39
Retail Establishments	81,618	50

Source: Sales & Marketing Management, 1980; U.S. Dept. of Commerce 1977

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MARKETING & MEDIA

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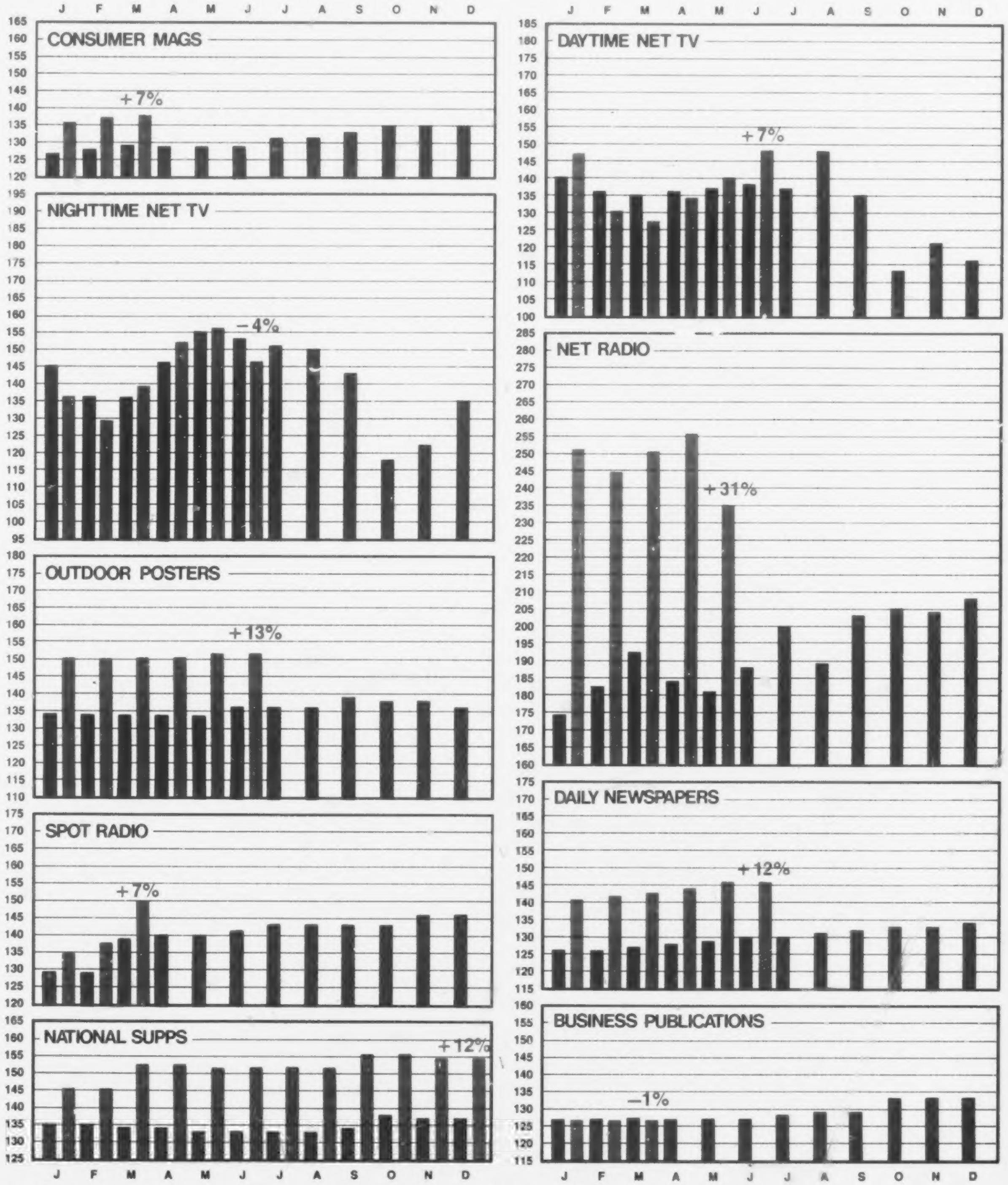
MEDIA COST INDEX

Black bars index for 1980; red bars 1981; base year 1977



The Media Cost Index reflects reported trends extracted from available published sources. This analysis uses standard competitive report sources to develop comparable costs that reflect monthly cost trends by medium. Where industry competitive sources are unavailable, selected cost data from SRDS are sampled. Sources: **Nighttime Network TV** — cost per average 30-second spot 7:30-11 p.m. Monday-Saturday and 7-11 p.m. Sunday from Broadcast Advertisers Report Network TV Service. **Daytime Network TV** — cost per average 30-second spot 10 a.m.-4:30 p.m. Monday Friday from Broadcast Advertisers Report Network TV Service. **Network Radio** — cost per average 30-second radio announcement from Broadcast Advertisers Report Network Radio Service. Index 100 for Nighttime network tv, daytime network tv and network radio are for each month in 1977. **Spot radio** estimates are based on SRDS cost of one minute on one station per market in the top 50 RADI markets. **Consumer magazine** estimate based on reported SRDS cost of page, 4-color in 30 national consumer magazines based on circulation. **National Supplements** estimates based on reported SRDS cost of page, 4-color for

COST TRENDS
a Decisions analysis

Network tv costs lagged behind ther media in pricing through June of his year.

Daytime net tv is running roughly at bout the same price level as 1980. It as up in January over the same month the previous year, down in February nd March and by June was at index 48 — 7% over June 1980.

Nighttime net tv, in contrast, in June 981 was at index 146 — down 4% om the same month in 1980. It ran ither below previous year levels or at bout the same level for the first few onths of this year.

Unit costs have become too dear for any national advertisers. They don't ant to quit tv, but the prices are just o rich for their blood.

Spot tv in primetime showed a ood recovery in March of this year — p 17% over March 1980.

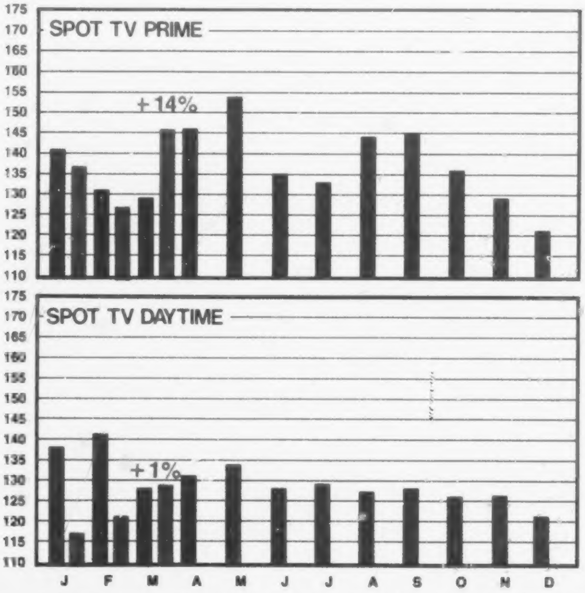
National supps — looked on by me advertisers as a mass medium ubstitute for tv — are having a good ear. They were commanding unit prices 14% over June 1980 in June of this year. And consumer magazine prices are holding up well, although early in the year there was some drop-off in page volume.

Another medium that benefits from advertisers who seek a mass audience but don't want to pay tv prices is outdoor.

It has shown considerable strength this year in volume in spite of price rises, and is finding a new and expanding market from new kinds of outdoor signs that are more expensive — like backlighted units.

Outdoor standard 30-sheet poster prices have been run 12% over 1980, and in June 1981 rose to index 151 — 51% over the base year 1977 and 13% over June 1980.

Newspapers are also doing well. Their volume is up in national as well as local, approximately matching price rises. In June 1981 newspaper prices were at index 145 — up 45% over 1977 and up 12% over June 1980.



e national supps. **Daily Newspaper** estimates based Newspaper Advertising Bureau report of SRDS costs agate line of a stratified sample of 155 newspapers. **siness Publication** estimates based on reported SRDS t of a page, 4-color for 48 magazines representing 42 siness and professional classifications. **Outdoor Post-** based on IOA reported card costs extracted from the Buyers Guide to Outdoor Advertising for a 50-showing in the top 50 metropolitan markets as defined by Sales Management. **HOW TO READ:** Media Cost Index reflects latest available cost compared to base of average year 1977. Percent change reflects annual rate of change and is based on latest available month costs compared to same month in previous year.

SOUTH BEND
Tribune
SHEDS
MORE
LIGHT

DAILY DELIVERS MORE IN ANY AGE BRACKET

66% — 18-34
74% — 35-49
80% — 50-64
79% — 65 and over

DAILY DELIVERS MORE OF ANY INCOME GROUP

79% — $25,000 and over
76% — $15-24,999
69% — $8-14,999

DAILY DELIVERS MORE AT ANY EDUCATION LEVEL

78% — part College or more
73% — High School graduate
66% — part High School or less

Daily delivers better "ratings" in a market greater than several entire states!

Source Belden CMS May-July, 1979

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Represented by Story & Kelly-Smith, Inc.

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Reducing aids on a media binge

Heartened by positive Federal Drug Administration evaluations, reducing aid marketers plunged into media with a vengeance in 1980. Still fatter budgets in network television and magazines are being served up this year.

NEW EXTRA STRENGTH LOSE WEIGHT FAST
CONTROL
CAFFEINE FREE

It's definitely fat city for reducing aids these days.

This once insignificant product category took off with a vengeance last year as media spending soared from $15.2 million the year before to $47 million in 1980.

Expenditures in this category have expanded suddenly because the manufacturers of such brands as Ayds, Dexatrim and Appedrine have a new story to tell to consumers.

Only three years ago, reducing aids and appetite suppressant marketers had little positive proof that their products actually worked. And even worse, consumers linked reducing aids with amphetamines, which had some unfortunate side effects.

But in March of 1979 the situation changed drastically. After years of testing, the Federal Drug Administration's over-the-counter internal review panel announced that it had found two ingredients in reducing aids to be safe and beneficial — benzocane and phenylpropanolamine, or PPA, for short.

The full effect of that announcement was felt in the media the following year when products containing either benzocane or PPA could make the most of their FDA endorsement.

SmithKline came out with a new product, Dietac, with PPA, while the well established Thompson Medical Co., which already had reducing aids on the market, added another and more than tripled its media expenditures.

Nabisco, with its PVM Diet Plan, and Jeffrey Martin, Inc., with Ayds, took a more conservative view of the good news.

Don Lapone, director of marketing and advertising for Thompson Medical, commented, "that decision was a green light for Thompson Medical and for the industry. It gave diet pills respectability. Since then the category has gone wild."

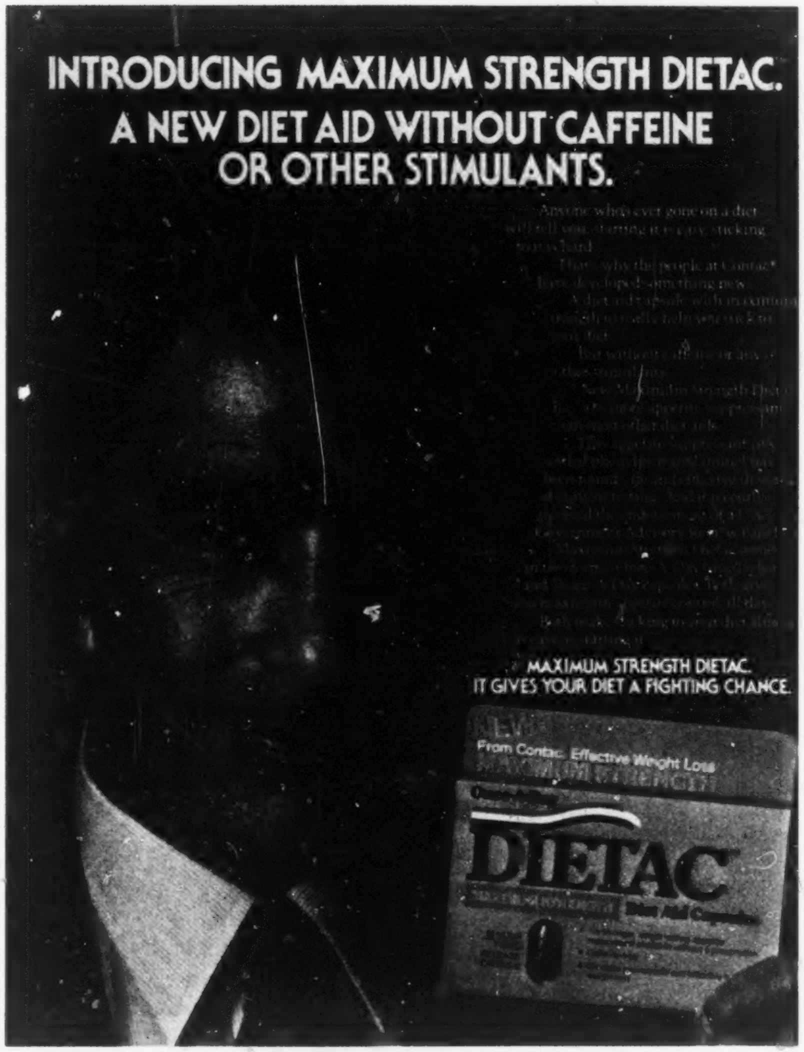
Thompson Medical has been the major beneficiary of the FDA findings, as combined market share for all its reducing aids expanded from 53% a year ago to 60% as of June, 1981.

With four brands on the shelves, Apperdrine, Control, Dexatrim and Prolamine, Thompson has a much better chance of winning the consumer's dollar than those companies with one brand on the market. Prime competitors for Thompson are PVM Diet Plan from Nabisco's J. B. Williams division, Ayds from Campana, and SmithKline's Dietac.

The heaviest media spenders among the brands are Thompson's Dexatrim, with $13,792,900 in 1980; Dietac, with $9,503,100, and Prolamine, with $4,364,000, according to LNA figures.

Network television, with its ability to reach a wide audience with dramatic before and after demonstrations, is the favored medium for the business. But magazines get a fair percentage of the budgets as a supplementary medium, with Dietac and Dexatrim each spending over $1 million in print.

SmithKline's Menley & James division launched Dietac last year with spokesman Bill Bixby on network tv and magazines.


INTRODUCING MAXIMUM STRENGTH DIETAC.
A NEW DIET AID WITHOUT CAFFEINE OR OTHER STIMULANTS.

MAXIMUM STRENGTH DIETAC.
IT GIVES YOUR DIET A FIGHTING CHANCE.

NEW
From Contac. Effective Weight Loss
MAXIMUM STRENGTH
DIETAC

Thompson's Lapone is enthusiastic about the continued growth of the category as well as his company's share of it. "I don't expect sales to fall off. Although there are seasonal aspects to the business, it's not seasonal for the true dieter."

The seasonality that does exist, he says, revolves around New Year's resolutions, a spring shape-up for bathing suit time, maintenance of weight for the summer, and preparation for the eating orgies of the fall and winter holidays.

As for marketing Dexatrim, the flagship brand, and the three others, Lapone said, "We recognize that awareness is the key to trial, so we turned to the mass media as the best way we knew of the get product trial."

For Dexatrim, Lapone and his agency, Compton, chose to go the creative route of testimonial advertising. "We know the product works," he said, gesturing to a bookshelf behind him loaded with black binders. "We've got a shelf of testimonial letters with photographs. We decided to turn the voice of the user out to other consumers.

Don Lapone, director of marketing and advertising for Thompson Medical, with heavily advertised brands Dexatrim, and Control. The company's other reducing products include Apperdrine and Prolamine.

Continued on page 78

''What we looked for was the communication value in the person's own story. When you put a person on camera, what you hope to get is that person.

''We take people who have written, then they talk with an interviewer, the testimony is recorded, and it becomes the basis for a script.

''Our agency, while adhering to the requirements for testimonial advertising, does use the testifier's own words,'' Lapone said.

But Lapone also is a firm believer in distinctive packaging. ''Our first tool, even before the media budget, is packaging that says 'look at me.' We also had tremendous word of mouth. In fact, I think all we had to do was let people know about it.''

1980 media expenditures for top reducing aids

Brand	Total	Magazines	Network tv	Spot tv
PVM diet plan	2,448,500		2,334,700	113,800
Ayds	2,723,700	2,233,100	59,000	431,600
Dietac	9,503,100	1,038,000	8,463,300	68,000
Appedrine	2,849,000		2,821,500	28,100
Control	3,574,200	79,700	2,643,100	851,400
Dexatrim	13,792,900	1,120,900	11,750,200	921,800
Prolamine	4,364,000	429,700	3,215,100	719,700

Thompson's expenditures for Dexatrim put $11,750,000 in network tv, $1,120,900 in magazines, and $921,800 in spot tv. The total for 1979 was $4,981,000.

Thompson's other brands got considerably less support last year. Prolamine topped out at $4,364,000, up from $1,167,400 in '79, followed by Control capsules at $3,574,200, for which no expenditures were listed the previous year, and Appedrine, at $2,849,600, up from $821,300 in 1979.

Each of these products is aimed at a different socio-economic segment of the market. Thompson Medical prefers not to discuss how it defines the segment differences, but an examination of creative shows some distinct points of departure for each.

Dexatrim's choice of users for testimonials tends to favor a blue-collar profile — people without a lot of pretension describing their experience. Dexatrim is targeted against both male and female users, and uses male testimonials.

Control is positioned against the female market and takes a glamour approach while also using satisfied consumers. Its lack of unpleasant side effects is stressed in copy. Network and spot tv are the primary media for the brand.

Prolamine's television copy is executed with professionals on camera and depicts more up-scale situations, such as sailing and country-clubbing.

Appedrine is a maximum strength appetite suppressant fortified with multivitamins, and appears to be pitched to the hard core dieter with some serious weight problems.

But even with a multi-brand approach, Dexatrim is the company's money maker. It was up in dollar sales 119% last year over 1979 and represented 60% of Thompson's total dollar sales volume.

Dietac

SmithKline's Menley & James division launched its PPA-containing Dietac last year with a substantial media send-off. Network television and magazines were the primary media.

Dietac's magazine copy stressed maximum strength and the absence of caffeine or other stimulants in four-color pages, with long copy and the product held by a presenter. The brand comes in two forms, a time-release capsule and a twice-a-day pill.

Menley & James claims it holds the second place in sales to Dexatrim, and thus far, hasn't tried to outspend Thompson in an effort to take over the top sales spot. But with SmithKline's resources, it could probably provide a disproportionate media commitment in an effort to dislodge Thompson.

Group product manager Peter Gonze commented, ''We're a heavy advertiser and we expect to remain so,'' but he didn't disclose whether the brand will attempt to outspend Dexatrim.

Media emphasis will continue to be in network television, Gonze said, with no major shifts in media strategy contemplated in the near future.

Ayds

This candy-type appetite suppressant also took advantage of the publicity from the FDA findings with a media budget that expanded from $1,154,200 to $2,723,700 last year.

The product is marketed by Campana, which was sold by Purex to Jeffrey Martin, Inc., in Union, N.J. The Martin organization has recently specialized in acquiring under-marketed products and giving them stronger advertising support.

Since being purchased in June by Jeffrey Martin, Ayds' media plan has been reversed, with the emphasis shifting from magazines to television. Although the company hasn't had time to develop a firm media plan, a television commercial was rushed into production by the in-house agency, Dunnon & Jeffrey.

Bob Varian, vp of marketing and advertising, said the brand would receive ''heavy advertising support'' in network and spot television.

''We're still finding our way with these new Campana products, and haven't developed firm plans yet,'' Varian said.

PVM Diet Plan

PVM is offered by the J. B. Williams Co., a Nabisco subsidiary. The PVM media budget increased last year, but took the smallest jump of the high spending reducing aids. The budget increase was from $1,981,000 to $2,448,500.

PVM's expenditures were all in televison in the past two years. However, the emphasis on network tv became more pronounced last year. The spot tv budget declined from $561,300 in 1979 to $113,800, according to Leading National Advertisers. ■

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FINDING A
RESPONSIVE
AUDIENCE
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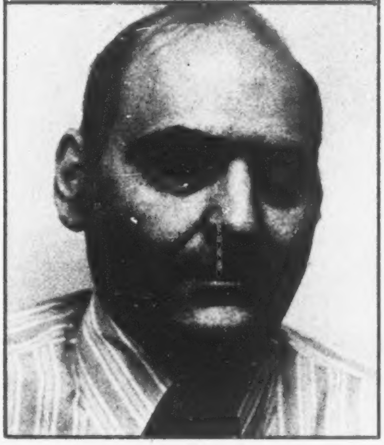
WHERE THE WELL-ADVISED ARE ADVERTISING.

AS THEY SEE IT

MEDIOLOGY
by ED PAPAZIAN



More disciplines in media mix

Nearly everyone in the media business recognizes that audience penetration factors vary considerably from one demographic grouping to the next, but many media plans ignore the subject — as too complex or vexing. The issue remains a crucial one — particularly where media mixes should be involved and advertisers are concerned about balancing or controlling their media exposure patterns.

An interesting demonstration of the interaction between various media is offered by Simmon's Media Imperatives tabulations. In these, Simmons isolates various segments of the population — based on the degree to which they are exposed to broadcast and print media, including pairing of heavily exposed groups. For example, if we take the 1980 SMRB study and examine its "imperatives" analysis for women, Simmons reports that 20% of all women are both heavy magazine readers *and* heavy tv viewers. In contrast, only 8% are heavy magazine *and* heavy newspaper readers, while the radio and magazine pairing is the largest group with 23% of the women exposed frequently to both.

Even more significant are the ways that such patterns develop when selective components of the population are examined in the same manner. Table I indicates the proportion of women who are heavy consumers of various pairs of media (tv & radio, tv & magazines etc.) by age and occupation cells. The table reads as follows: According to the 1980 SMRB study, 14% of all women who are 18-34 years old and are professionals or managers, are heavy magazine *and* heavy tv users. The corresponding percentages rise steadily as we move horizontally from the clerical and sales column to the "other employees" (blue collar and service jobs), and peaks at 24% among the unemployed.

The table only hints at the myriad of interactive possibilities. Within each medium there are selective options that offer the media planner countless opportunities to govern the composition of his audience. While generally radio is strongest among young adults, some formats blend much more effectively with a tv or print plan than others. This is true with magazines, especially, where almost any segment of the population can be targeted and, to a lesser extent, with tv itself, where small wonders can be done by juggling show types and day parts.

Unfortunately in 25-54 or 18-49 targeting, many of these nuances are lost. Even when attention is focused on upscale audiences or working women, the tendency is to overgeneralize — dealing with a composite demographic "target," rather than its individual components.

In this context, it is interesting to examine how a typical tv-only media plan actually looks when it is analyzed in demographic detail. Suppose we are dealing with a $6 million budget for a women's personal product (a shampoo perhaps). If the usual practice is followed, the schedule will include a mix of primetime tv (for reach), daytime (to exploit its efficiency), and late night tv (for added efficiency, coverage of working women etc.). In this case, using fourth quarter 1981 network rates, our monthly budget of $500,000 might buy two primetime 30's, plus twelve daytime and eight late fringe announcements. This represents a budget split of 35% in primetime, 35% in late evening, and 30% in daytime. Overall, four-week women's GRP's would add up to about 138 with daytime tv supplying half the total. Four week reach might be 60 to 65%, an average frequency would fall in the 2.1-2.3 range.

But what does this fairly typical media plan look like to the consumer? The answer varies considerably from one segment of the population to another. Taking women by age and occupation, for a point of departure we see hugh differences in four-week GRP's in Table II.

Most marketers would prefer to avoid the kinds of imbalances indicated by this analysis, but few of them are even exposed to such statistics. So, they fail to appreciate the scope of the problem. If young working women — particularly those in white collar occupations, represent a major segment of the marketer's consumption franchise, his tv effort is targeting this group with *minimum intensity*.

Once a brand manager or ad director sees an analysis like the one we have developed, he is likely to ask how an adjustment can be made, without a major departure in his total commitment to tv. And in this case, the answer is quite simple. If only one primetime tv 30 were deleted, and replaced by page four color ads in *Metropolitan Home*, *Cosmopolitan*, *Glamour*, and *People* magazines on a monthly basis, this change, involving less than 20% of the total budget, would produce the following four week GRP levels (See table III).

The new impression pattern is a vast improvement over the all-tv version of Table II. It is accomplished with only a minor dollar change in the total media mix. Yet much of the distortion that would otherwise prevail is eliminated. If the agency can come up with a good print campaign (and why shouldn't it?) the brand may benefit considerably in advertising effectiveness.

There are many ways to juggle media mixes. Audience statistics are only one dimension of such analysis. Like building blocks, they set the stage for qualitative considerations — quantifying the relative gains of losses that various approaches offer in generating advertising contacts with consumers. But I wonder how many media plans explore this vital issue in depth? My guess is that not enough actually do. And that is primarily the advertiser's fault, not the media planner's. ■

Table I: Simmons dual media imperatives for women by age and occupation (% of each group exposed heavily to each media)

	Prof/ Mgr.	Cler/ Sales	Other Emp.	Not Emp.
Age 18-34				
Heavy mags/heavy tv	14%	18%	19%	24%
Heavy mags/heavy radio	37%	32%	31%	23%
Heavy mags/heavy newsp.	12%	7%	6%	5%
Heavy tv/heavy radio	9%	15%	18%	20%
Heavy tv/heavy newsp.	3%	3%	1%	4%
Heavy radio/heavy newsp.	13%	5%	5%	3%
(% of women population)	(5.9)	(10.2)	(7.2)	(15.9)
Age 35-54				
Heavy mags/heavy tv	16%	16%	18%	22%
Heavy mage/heavy radio	28%	29%	21%	20%
Heavy mags/heavy newsp.	18%	12%	8%	9%
Heavy tv/heavy radio	13%	16%	20%	12%
Heavy tv/heavy newsp.	6%	7%	6%	22%
Heavy radio/heavy newsp.	12%	9%	5%	8%
(% of women population)	(5.2)	(7.6)	(6.1)	(11.4)
Age 55 plus				
Heavy mags/heavy tv	23%	23%	19%	20%
Heavy mags/heavy radio	18%	18%	20%	13%
Heavy mags/heavy newsp.	21%	14%	5%	6%
Heavy tv/heavy radio	20%	20%	22%	24%
Heavy tv/heavy newsp.	9%	8%	4%	9%
Heavy radio/heavy newsp.	12%	5%	3%	5%
(% of women population)	(1.3)	(2.0)	(2.8)	(24.4)

Source: SMRB, 1980 Study of Media & Markets.

Table III: 4-week women GRPs — tv & print plan

	Age			
	18-34	35-54	55 plus	Total
Occupation				
Prof/mgr.	154	121	158	141
Cler/sales	144	125	103	133
Other emp.	159	136	121	143
Not emp.	201	177	159	176
Total	171	146	152	159

Table II: 4-Week GRPs — all tv plan

	Age			
	18-34	35-54	55 plus	Total
Occupation				
Prof/mgr.	87	96	144	97
Cler/sales	95	104	95	98
Other employed	116	127	124	122
Not employed	170	170	165	168
Total	128	132	156	138

Brand report 68:

New cars

While imports still hold a healthy share of the market, U.S. car sales continue to droop. In an effort to recapture its losses, Detroit is producing smaller Japanese look alikes and launching an intensive advertising campaign to convince American consumers that quality is back. Ironically, Japanese auto makers are setting their sights on producing bigger and more luxurious cars. As the bite of inflation continues to gnaw at the U.S. economy, how much effect will these trends have on car sales?

In trying to recapture a share of the market that's been lost to the Japanese and restore an image that's been tarnished, the real hurdle Detroit has to overcome is one of quality. Attempting to convey the message that Detroit finally is producing the kind of cars the American consumer wants, U.S. auto makers are advertising quality, quality and more quality. Ironically, points out Paine Webber auto analyst Maryann Keller, "The Japanese are advertising sex, flash and glamour — just like the American car companies of the 1960's. We are driven, aren't we?"

While imports continue to hold a healthy share of the U.S. market, Detroit is keeping no secret about its efforts to retaliate. And industry experts agree, the most telling blows will be the ones that bolster the U.S. quality image.

General Motors corporate advertising, in an attempt to boost its quality image, features employees commenting on the care they put into their jobs. And Ford recently switched its corporate ad theme to "At Ford, quality is job one," playing up the 25% increase in quality Ford claims to be achieving each year based on repair and defect statistics. Other car manufacturers are following suit with similar campaigns.

But how much effect all the hoopla about quality will have on the buying habits of the American public remains to be seen. Though the U.S. auto industry had only modest hopes for 1981 sales — 10 million cars, compared to 8.9 million sold in 1980 — chances of attaining that goal are slim. Analysts now predict that the industry might sell no more than nine million cars this year.

Of the big three U.S. auto makers, Chrysler and Ford announced year-to-year gains in early July.

Nonetheless, strong production throughout the industry, combined with lagging sales, have pushed inventory levels of 1981 cars to record highs as the third quarter began.

Stiff competition from the imports is not the only problem Detroit has to contend with. Another, according to J.D. Power & Associates in a recent survey of potential car buyers, is the persistence of high interest rates and their psychological impact on consumers. The survey states that the effect of rising prices may inhibit people from buying an expensive item like a car until absolutely necessary.

Another sore spot Detroit must face up to is what industry sources refer to as "sticker shock syndrome." Customers returning to dealer showrooms are aghast to find that sticker prices have skyrocketed over the past few years. There has been a 15% increase in new car prices between 1980 and 1981 alone.

While car prices are rising, disposable income — the amount left over after taxes and the bite of inflation — continues to diminish. Disposable income was an average 2.9% in 1980 and only half of that during the first half of 1981. With less money to spend, consumers' buying habits are changing as well. According to one industry spokesman, people are becoming a lot more practical.

Despite the problems, manufacturers are betting these days on "pent-up demand." As older cars wear out, consumers will be forced back into new car showrooms that many have avoided in the past two years — or so the theory goes. Whether or not this surge for U.S.-made cars will be unleashed this fall is a matter of speculation.

While many in the auto industry agree that a drop in interest rates and a rebound in the economy would spur sales, should this fail it may take another round of dealer incentives and rebates to fuel consumer interest. Rebates were effective in cranking up sales earlier this year, but momentum dropped off as the special offers were halted. As noted in *The Record,* (a New Jersey newspaper) David Healy, an analyst with Drexel Burnham and Lambert believes that, "Auto sales will probably continue to be depressed until Detroit comes up with a strong rebate program. . . . Availability of credit for new cars and high gas prices are problems that just aren't going to go away."

Chrysler, Toyota and Volkswagen did offer summer dealer incentives. And while the industry promoted rebates earlier this year, car makers are no longer in a good position to do so, Ford and GM in particular. Both will be in the midst of expensive new

HERE IT IS!
THE NEW J GENERATION
PONTIAC J2000
GM

A NEW SET OF VALUES FROM PONTIAC! J2000 for 1982! Featuring a new specially equipped coupe, with manual transmission and without air conditioning and power steering, that offers a high mileage rating! 47 HWY. EST. ㉚ EPA EST. MPG. Use estimated mpg for comparison. Your mileage may differ depending on speed, distance, weather. Actual highway mileage lower. This coupe not available in Calif. J2000! With great standard features!

- Delco-GM AM radio with integral digital clock (may be deleted for credit)
- MacPherson front & semi-independent rear suspension
- Reclining front bucket seats & console
- Side window defoggers
- Locking fuel filler door
- Rack & pinion steering
- 4-spd. manual trans. with overdrive
- Power front disc brakes
- Front-wheel drive
- L4 engine

J2000! A new generation of Pontiac know-how!

Print media for Pontiac's J-car includes newsweeklies and upscale magazines.

model introductions for the next few years. If they offer rebates, they may increase sales now and keep more dealers happy. But lower prices squeeze profit margins and make it harder to come up with funds needed to tool new models.

In addition to everything else that continues to plague automakers, in order to build up consumer confidence that has been eroding over the past decade, we come back to the issue of quality. Maryann Keller, for one, thinks that the recent trend in car ads emphasizing quality is a somewhat defensive posture, "All this talk about how they've (US auto makers) redesigned cars with quality in mind . . . it's kind of admitting that they goofed in the past." While she goes on to say that it's important to stress quality, this can be brought out more effectively. For example, Keller suggests since marketing studies indicate that consumers are afflicted by sticker shock syndrome, advertisers would be wise to sell potential buyers on the fact that they will be able to recover the high costs of purchasing a car in the form of superior construction, lower maintenance costs, better fuel economy and therefore lower operating costs.

Whether Detroit will be able to stem the flood of imports in general, and Japanese imports in particular, which now command 23% of the U.S. car market, remains a moot question. Given all the uncertainties that exist, the only firm conclusion that can be drawn is that the most effective advertising thrust and direction will be the one which best appeals to the frustrations, needs and demands of the American car buyer.

American Motors

Two years ago, AMC and Renault of France began mapping their strategy to join forces. The initial plan showed Renault investing $100 million in AMC for a modest 4.7% equity stake that would rise to 22.6% by the year 2000. In exchange, Renault would gain access to AMC dealers in the U.S. to market its French-built Le Car as well as other models. In addition, AMC's earnings were to finance the American conversion of the X-42, a subcompact to be built by Renault.

Despite what was thought to be the best of plans, foresight could not predict that AMC would lose a record $197.5 million in 1980, and pile up $72.6 million more in losses during the first half of 1981. In response, Renault had to do some fancy foot work to keep AMC on the road, to date, according to *Business Week,* the company's investment in AMC has more than doubled.

Regardless of spiraling costs, both companies remain deeply committed to keeping their original agreement, Renault's investment being essential to each partner's corporate strategies. For AMC, the linkage could represent a critical move to sidestep bankruptcy later on this year. For Renault, the move means quick penetration into the U.S. market. Although it is the world's sixth largest auto maker, Renault's U.S. share of the market is only 0.4%. The company figures it would take 10 years or more to build the U.S. sales network and production capability it will have by 1983 through AMC.

AMC's future plans call for phasing out its only two lines of domestic cars — the Spirit and Concord — by 1984. After that, Renault will design all of its passenger cars, and AMC will continue to develop its front-wheel-drive Jeeps that will be sold by both companies. A wide variety of model variations will be built on the X-42 "platform," with perhaps a larger car added in the 1980s.

[illegible]

	[illegible] Total	Magazines	Supps	Network tv	Spot tv	Network radio	Outdoor
[illegible]	$ 7,[illegible]	$1,[illegible]		$ [illegible],741,100	$ 7,[illegible]		
[illegible]	5,[illegible]	534,100		5,169,900	176,200		$ 10,700
[illegible]	[illegible]	826,700		5,988,200	206,300		
[illegible]	[illegible]	1,876,300		6,019,000	365,000		21,400
[illegible]	[illegible]	[illegible]		[illegible]	351,300		[illegible]
[illegible]	[illegible]	1,[illegible]		10,247,400	1,199,000		[illegible]
[illegible]	[illegible]	[illegible]		5,305,800	1,887,900		194,[illegible]
[illegible]	[illegible]	[illegible],773,900	$101,100	2,421,200	[illegible],238,300	$420,000	
[illegible]	11,[illegible]	1,[illegible]		7,891,300	[illegible]	44,000	1,7[illegible]
[illegible]	[illegible]	[illegible]		[illegible]	1,[illegible]	[illegible]	51,[illegible]
[illegible]	[illegible]	4,[illegible]	[illegible]	12,[illegible]	11,[illegible]		[illegible]
[illegible]	[illegible]	3,[illegible]		[illegible]	[illegible]		[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	11,018,100	[illegible]		[illegible]
[illegible]	[illegible]	[illegible]		[illegible]	[illegible]		[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	12,[illegible]		[illegible]
[illegible]	[illegible]	[illegible]	42,100	[illegible]	2,271,300		[illegible]

Media expenditures were down for all AMC lines in 1980 with the exception of the Eagle. Leading National Advertisers shows that spending for the Eagle more than doubled from $3.8 million in 1979 to $7.8 million in 1980, with heavy expenditures in net tv.

Chrysler

At this time last year, Chrysler's hopes for survival were shaky, despite its Federal loan guarantees. However, as a result of second quarter 1981 earnings of $12 million, Chrysler's first profit reported in over two years, Chairman Lee A. Iacocca stated that he would not ask for the remaining $300 million in loan guarantees authorized by the Fed.

Surprisingly, Chrysler profits came despite a sluggish six months during which nationwide auto sales were well behind expectations. In order to stimulate drooping sales during this period, Chrysler issued rebates in the spring and late summer, as well as dealer incentives. According to one Chrysler spokesman, most of Chrysler's earnings can be attributed to the Omni, Horizon and the company's lineup of front-wheel-drive K cars. Although there was initial buyer resistance to the K's when they were introduced last September, the public's acceptance of them is largely responsible for helping Chrysler increase its share of the market for U.S.-made cars in the first half of this year to 12.1% compared with 9.6% for the same period in 1980.

Despite the good news from Chrysler, some analysts predict that the company's ultimate survival will be closely linked to its arrangements with Mitsubishi Motors Corporation, including injections of Mitsubishi design and production technology, joint-venture manufacturing, and even cash investment by Mitsubishi in Chrysler. Ironically, this marks a turnaround from a decade ago when Chrysler bought 15% of Mitsubishi.

According to Leading National Advertisers, in 1980, six-media totals were the largest for the Reliant-K ($8.0 million), Mirada ($7.0 million) and Aries-K Cars ($5.9 million). Advertising was heavily concentrated in net tv and some spot tv for all three cars. Print media for the Aries and Mirada consisted of a heavy emphasis in magazine and some newspaper advertising.

For 1982, Chrysler still believes smaller is beautiful. While the nameplates for Chrysler's full-sized models will still be around, they will be attached to bodies that are significantly smaller. Buyers looking for the New Yorker, for example, will be surprised to find a car that is almost two feet shorter than its predecessor.

In the K lineup, luxury versions of Plymouth Reliant and the Dodge Aries will appear under the LeBaron nameplate in 2 and 4-door models. They will be followed later by a premium wagon. And for all the topless driving enthusiasts, Chrysler will introduce a luxury K-convertible in the spring.

Ford

Despite the state of the economy, Ford reported that it had earned a profit of $60 million in the second quarter of 1981, compared to a loss of $467.9 million in the second quarter of 1980.

The size of the profit surprised securities analysts who had expected the company to be about at the break-even

Winner by a landslide! AGAIN!

KELO-LAND TV
racks up a barrel of Number Ones in nationwide Arbitron Sweeps

#1	ADI	S/O - S/O	Women (18-49)	47 share
#1	ADI	S/O - S/O	Total Households	48 share
#1	ADI	Prime Time	Women (18-49)	41 share
#1	ADI	Prime Time	Total Households	43 share
#1	ADI	Late News	Total Households	59 share
#1	ADI	S/O - S/O CBS	Total Households	48 share
#1	ADI	Prime Time CBS	Total Households	43 share
#1	ADI	Late News CBS	Total Households	59 share

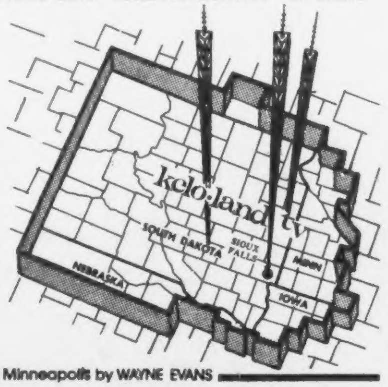
A CBS AFFILIATE

kelo·land tv

KELO-tv SIOUX FALLS, S.D.
and satellites KDLO-tv, KPLO-tv

Source: Arbitron Sweeps, May 1981. Affiliates of all three networks in equal facilities markets. Survey data estimates subject to usual qualifications.

Represented nationally by SELTEL In Minneapolis by WAYNE EVANS



point at that time. Ford's earnings marked the end of six consecutive quarters of losses just exceeding $2 billion.

Without a doubt, according to a Ford spokesman, the Escort and Lynx front-wheel-drive lineup introduced last September was the lynchpin in the automakers turnaround. Ford boasts that the Escort was the nation's number one selling car in April, May and June of this year, and accounts for 30% of Ford Division sales and about 19% of the subcompact market. The Ford Division Escort and the Lincoln-Mercury Lynx are essentially the same under the hood with some cosmetic body differences.

The two main features highlighted in the ads for both cars are fuel efficiency and fun driving. According to Robert J. Gillooly, advertising manager for Ford Division, "Gas mileage is still extremely important, but some of the concerns about last year's gas scare have levelled out, and people are beginning to think about the pleasures of driving again. And," Gillooly continues, "America's love affair with the car is just beginning to resurface."

If Gillooly is right, and if the economy improves, perhaps there will be a greater market for sporty and luxury cars as well as "functional econoboxes." Ford and Lincoln have already introduced sporty youth oriented two-seater versions of the Escort and Lynx, called the EXP and LN 7. Creative themes are "Two seat excitement is back" and "Tomorrow is here."

For 1980, Leading National Advertisers shows media spending for the Escort was heavily concentrated in network tv ($9.8 million) with the rest in spot tv ($350,300), magazines ($468,400), newspapers ($155,250) and outdoor ($838,600). Advertising expenditures for the Lynx were slightly lower with a similar pattern of spending, except for a larger spot tv budget ($1.8 million) and smaller outdoor spending $196,900).

The new car lineup for '82 will include four-door Escort and Lynx models, and three-seat versions of the EXP and LN 7. Other models expected to stir buyer interest are a new station wagon in the Granada/Cougar series and a downsized Lincoln Continental.

General Motors

In an attempt to meet the Japanese onslaught head-on this spring, GM rolled out its "J car," a front-wheel-drive subcompact. This "world-concept" car was just the beginning. GM has

Cimarron's market includes affluent, young professionals the company hopes to lure away from such

bigger plans to reinvent its entire product line and produce a wide range of cars using practically every letter of the alphabet. In the future, 90% of GM's fleet will feature front-wheel drive.

The J car is being built overseas as well as in the U.S. and Canada. All J-car plants have been completely retooled with state-of-the-art assembly and testing equipment.

In addition to overhauling its physical resources, GM has also restructured the human side of its operation. Like other U.S. auto makers, the company has been hurt by an increasing incidence of alcoholism and drug abuse on the job, as well as absenteeism, sloppy workmanship and in some cases outright rebellion, not to mention general indifference. In an effort to deal with these problems, the company now operates Quality of Work Life (QWL) programs in several of its plants and is expanding the program. The goal of QWL is to eliminate employee grievances, as well as boost productivity, improve loyalty and especially quality. While they are no panacea, GM finds that QWL programs are paying off for both employee and employer. In an all-out effort to get its quality campaign across to the public, GM is advertising it widely.

GM had plans to launch a good part of its new product line by 1984, however because of the cost of its retooling and development efforts, combined with the state of the economy, the company will defer some of its plans due to the cash crunch. At this writing, the following cars have been shelved:

- The Pontiac P-car, a sporty mid-engine two seater with a fiberglass body and high-mileage four cylinder engine.
- The new front-wheel-drive A body intermediates.
- The new-for-1982 Camaro and Firebird, delayed for a third time.

According to Charlene Curry, advertising manager for Pontiac, "The advertising campaign on the J-car was the biggest media blitz we have ever used on a single car line. Taking its cue from Pepsi, the corporate ad slogan for this lineup is "The J Generation."

Pontiac relies heavily on net and spot tv with ads in primetime, on specials and Sunday night movies. Print media include newsweeklies as well as such upscale magazines as *Ecology Today*, *Smithsonian* and *Scientific American*.

Imports as the German-made Audi and BMW, plus top-of-the-line Japanese models.

A NEW KIND
OF CADILLAC.
Cimarron

FORD ESCORT.
BUILT TO TAKE ON THE WORLD...
AND DOING IT.
44 EST HWY
30 EPA EST MPG
THE NEW WORLD CAR.
FORD ESCORT
FORD DIVISION
Ford

Outselling every import car line.
When this ad went to press, the American-built Ford Escort was outselling every import car line.

And no wonder. Ford engineers worldwide teamed up to create this technologically advanced car.

Its compound valve hemispherical head engine gives you high mileage combined with power for freeway driving.

The manual transmission has a 4th gear overdrive standard. A new split-torque automatic is available.

The body design is as aerodynamic as some sports cars. Special steel, high-strength steel, reduces weight without sacrificing solidity.

Result: the compact Escort has better gas mileage ratings than subcompacts like VW Rabbit, Honda Accord, Toyota Corolla Hatchback—and, based on EPA Volume Index, more interior room, too.

*Applies only to sedan without power steering or A/C. For comparison. Your mileage may differ depending on speed, distance, weather. Actual hwy mileage and Calif. ratings lower. Excludes diesels.

What about handling?
Front-wheel drive gives you traction for snow and wet roads. All-season steel-belted radials are standard.

Four-wheel independent suspension smooths the ride, grips the road. And for precise handling, there's rack-and-pinion steering.

Engineered to keep your driving costs down.
Escort has a chassis lubricated for life, 30,000 mile spark plugs, self-adjusting brakes and clutch, and the body is cathodically electrocoated to fight rust.

Most Escort models carry the lowest premium available from Allstate Insurance for any 1981 domestic car under their make and model rating program.

There's a lot more to know about Escort, and your Ford dealer is ready to help you do it. And, whether you buy or lease, don't forget to ask about Ford's Extended Service Plan.

The Escort was Ford's top selling car in April, May and June accounting for 30% of Ford Division sales.

While Pontiac relied heavily on tv this past spring, according to Gordon Horsburgh, Cadillac director of marketing, a lower ad budget for Cadillac forced the company to focus exclusively on print media. However, with an increased ad budget this fall, Cadillac will feature 30-second commercials on net and spot tv, as well as radio and print coverage. Print media include buff books like *Motor Trend, Car and Driver, Road and Track,* newsweeklies, business and upscale magazines.

In 1980, Cadillac sold half as many cars as in 1979. Most industry experts agree that the company was hurt by its reputation for selling large, luxurious, gas guzzling cars. As a result, Cadillac came up with "A new kind of Cadillac for a new kind of Cadillac owner," which incidentally is the ad theme for the Cimarron. Also a J-car, its market includes affluent, young professionals the company hopes to lure away from such imports as the German-made Audi and BMW, plus top-of-the-line Japanese models.

Following the lead of its European rivals, the Cimarron includes power brakes, reclining bucket seats, side and rear window de-foggers and radial tires as standard equipment. Estimated mileage is advertised at 26 city and 42 highway.

The advertising strategy for Cadillac has undergone some major changes. In the past, states Horsburgh, "the extent of our tv advertising was to show a straight sideview of the car. We never got inside, nor did we do comparative advertising. Also, our print advertising now includes charts and diagrams pointing out the interior room features as well as special engine and body components."

Why a closer look inside the car? According to Horsburgh, today's potential buyer is far more sophisticated about cars than in the past. He adds, "By highlighting the features one by one, and — in the broad sense — stressing fit and finish and desirability, you actually spell out quality without having to say it. And that's what people will pay for."

Imports

While American car makers are shooting for small and simple in their new car designs, Japanese manufacturers are setting their sights on producing bigger and more luxurious cars chock full of electronic gadgets and standard features. And although fuel efficiency is still an important concern, comfort, durability and elegance are taking on renewed emphasis in advertising. Whether the Japanese can develop successful Cadillac or Lincoln counterparts is yet to be proven.

Although Detroit auto makers had high hopes that import restrictions would enable them to regain large shares of the U.S. market lost to Japan, most industry observers agree that the arrangement worked out between the two countries will hardly dent sales. Under the present agreement, Japanese car shipments to the U.S. will be limited to 1,680,000 between April 1, 1981, to March 31, 1982. Last year, Japanese auto makers shipped about 1,820,000 cars to the U.S. According to analyst Maryann Keller, Japanese car makers already had high inventories in the U.S. before import quotas were set. "I don't think import restrictions as outlined by the two governments will at all impede the Japanese from having a record sales year . . ." Nor does she feel that the state of the U.S. economy will hurt them. Keller adds, "They have been reporting year-to-year increases in volume for the past two months, whereas the domestic car companies are reporting a decline."

Nonetheless, of the four big

There is more to Georgia than Atlanta...the
GEORGIA GROUP

THE NATION'S #1
NEWSPAPER GROUP BUY

●

Population . . . 1,290,000
Georgia Group Populaton would rank 31st In The Nation
100% More People Than Charlotte

●

Total Retail Sales . . . $5,226,100,000
Georgia Group Retail Sales would rank 34th In The Nation
82% More Retail Sales Than Charlotte

●

ALBANY HERALD	ATHENS NEWS BANNER-HERALD
AUGUSTA CHRONICLE-HERALD	COLUMBUS LEDGER-ENQUIRER
MACON TELEGRAPH-NEWS	SAVANNAH NEWS-PRESS

FACT:

$70,700. That's the average household income of Florida Trend subscribers. Net worth — just under $500,000.

florida trend

FACT:

92%. That's the percentage of subscribers who hold stocks, bonds and other investments — average valuation — $190,300.

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FACT:

63%. That's the percentage of subscribers in top management positions — and more than 50% are board members or directors.

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Japanese auto makers, only Mazda claims to be planning for a slight decrease in sales due to restrictions by keeping its 1982 advertising expenditures at a modest level.

In general, six-media totals reflected in Leading National Advertisers showed a slight decrease between 1979 and 1980 with the biggest drop noted for the Volkswagen Rabbit from $24.3 million in 1979 to $15.9 million in 1980. Toyota continued to stay well ahead of the other imports in total advertising expenditures for 1980. And while most import ads were heavily concentrated in net and spot tv, significant attention was given to magazine coverage as well.

Datsun

The hottest item on Datsun's newsfront these days is its plans to change its name to Nissan in the U.S. Although the Nissan name is well known in Japan, Datsun is far more familiar in the U.S. However, according to Tetsuo Arakawa, president of Nissan Motor Corporation in the U.S., the name change will not happen overnight, but in a gradual, evolutionary manner. He further explained, in a corporate memo cited by *Automotive News*, that the move is part of an ongoing effort to bring all of Nissan's international auto operations under the same corporate umbrella.

The name change has brought a wave of protest from dealers in anticipation of the high costs of changing everything from signs to envelopes.

Datsun plans to contribute in a big way to the onslaught of front-wheel-drive cars offered by U.S. automakers this year. Already introduced in Japan is a series of new transverse-engined, front-wheel-drive, independent suspension, Datsun Stanzas (510 series replacement), expected in the U.S. in October. And sometime in mid-1982, the company will add all-new front-wheel-drive 210 and 310 models.

Datsun still holds the number two sales spot among imports, and is also number two in media expenditures. The successful slogan, "We are driven" is still being used for Datsun ads. Probably in response to Detroit's boasts of high EPA estimates, Datsun now stresses durability as well. The copy for the B210, for example, reads: "Today most everyone wants a high-mileage car. But sometimes the car that goes further on a gallon also goes faster to a trade-in."

Leading National Advertisers indicates that Datsun's six-media total for 1980 was down by $3.1 million from 1979. There was a decrease in net tv from $17.4 million in '79 to $12.9 million in '80. Outdoor was about the same for both years.

Fiat

So long as Japanese imports hold the lion's share of the U.S. market, life continues to be difficult for most other foreign car makers. "It's been a tough year for us," admits A. Dudley Coan, national advertising manager for Fiat. Along with a host of other car manufacturers, Fiat was forced to offer rebates and dealer incentives in early 1981 to stimulate sales.

Describing Fiat's media strategy, Coan reports, "For the most part, advertising has been concentrated on the Spider and X1/9 sports cars. However, to move high inventories this summer, spot tv, radio and newspaper ads featured Brava and Strada sedans."

Fiat uses spot tv, consumer magazines, supps and outdoor as its primary media. Spot tv and cable focus on news and sports programing. Fiat's magazine list includes newsweeklies, sports magazines and buff books. To reach women, Fiat advertises in *Ms.* and *Working Woman*.

The ad theme, "Nothing moves you like a Fiat" plays on the emotional and physical appeal of the car and stresses that you have to drive one to understand its message.

Commenting on changes in the 1982 budget over 1981, Coan notes, "There will be a modest increase in '82 expenditures with tv and magazines absorbing a greater part of the budget and spot tv getting most of the play."

Fiat recently switched ad agencies from Benton & Bowles to Hank Forssberg, Inc. In discussing the reason for the change, Fiat chairman and ceo, Claudio Ferrari, indicated that changing market conditions require more emphasis on retail and dealer-oriented advertising with a different media selection. However, details of the media breakdown were not given.

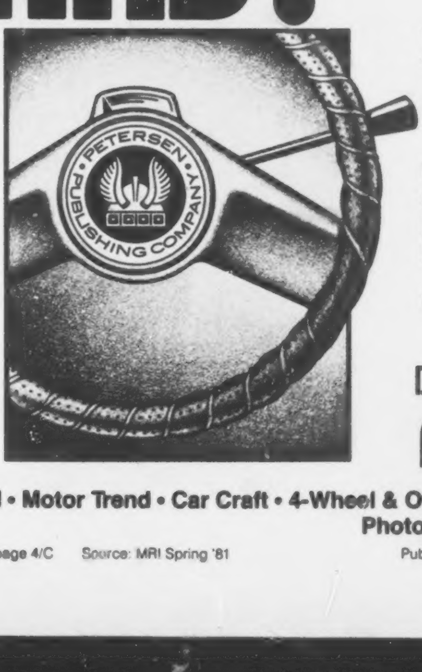
Honda

With its introduction of the '81 Honda Civic four-door sedan, it's obvious that the company with the reputation for selling the smallest car in the U.S. is beginning to think bigger. A step up from the toy-like Civic Hatchback, the sedan has grown in weight and height and, most notable, 13 inches in length.

Honda's advertising budget remained stable between 1980 and 1981 with the two areas of concentration being net tv and magazines. According to Joe Haight, national advertising and sales promotion manager for Honda's Automobile Division, net tv budgets increased slightly in 1981 to $13.0 million, up a million from '80. Magazines decreased to $8.9 million in 1981 from $9.3 million the year before. And the radio budget of $50,000 in 1980 dropped to zero this year.

However, with regard to radio expenditures, Haight said that Honda made $7 million available in 1980 for

SELLING CARS?



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Petersen Action Group men buy, race, build, and love cars. They also read us, cover to cover.

Petersen men are more than twice as likely to own two or more cars. And they have 'informational clout'—the ability to influence the car buying decisions of millions of people every year. You can reach our men for only $4.04 per thousand.*

And we have the most flexible plan available for reaching men 18-34—the Petersen Action Group Discount.

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*Based on 1-page 4/C Source: MRI Spring '81

Published monthly by **PETERSEN PUBLISHING COMPANY** 8490 Sunset Blvd., Los Angeles, CA 90069.

dealer advertising allowances. Total advertising expenditures increased marginally from $24 million in 1980 to $25 million in 1981.

The Honda magazine list includes *Time, U.S. News & World Report, Sports Illustrated, Rolling Stone, Reader's Digest, National Geographic, Psychology Today, Scientific American, Omni, Playboy, Cosmopolitan, Ms., Glamour, Money, Car and Driver, Motor Trend* and *Road and Track*.

Net tv programing is heavily geared to sports. Honda sponsored 24 NFL football games for the first time this year. Locally, Honda foots the bill for pre-game sports shows in markets where they are available on a spot basis. Some of these included the Chicago White Sox, the Cincinnati Reds, and on radio, the Houston Oilers, and the University of Indiana for football and basketball.

Although media plans have not been finalized for the '82 season as yet, Haight predicts that ad budgets will basically remain the same.

Mazda

"The more you see, the more you like," continues to be the ad theme Mazda uses for its diversified mix of U.S.-marketed cars. This features, among other models, the front-wheel-drive GLC (Great Little Car), and RX-7 GSL sports car, rated in a recent *Road and Track* article as "one of the outstanding sports cars available in the world today, especially considering the price." Included as well is the 626, a luxury car with a rundown of standard items ranging from power steering, brakes, windows and locks to cruise control, AM/FM radio, reclining seats, and steel belted radials — and this is just a small sampling.

To advertise these cars, according to Brad Fogal, an assistant account exec at Mazda agency, Foote, Cone and Belding, Los Angeles, Mazda uses 80% net tv with a focus on sports, news and primetime programing. Cable too is used for sports show exposure. Mazda is starting to use radio, Fogal adds, and will use more in '82. Ads also appear in *Newsweek, Time, Sports Illustrated, U.S. News & World Report,* as well as the buff books: *Car and Driver, Road and Track* and *Motor Trend.*

> “
> **Mazda is using 80% net tv with a focus on sports, news and primetime programing. Cable is used for sports exposure.**
> ”

Fogal predicts that the '82 advertising budget won't change much because of import restrictions.

Toyota

Until 1981, the Japanese seemed content to leave the luxury (and high revenue) end of the car market to the Americans and Europeans. But all that has changed with Toyota's introduction of the '81 Cressida, a smooth riding luxury car replete with a laundry list of standard features such as power windows, cruise control, climate control air conditioning, AM/FM 4-speaker stereo, power locks and quartz digital clock.

> “
> **While most of Detroit is scaling down its cars and aiming for Japanese simplicity, Japan's number one auto maker is increasing the Cressida in length, weight, height and width.**
> ”

And while most of Detroit is scaling down its cars and aiming for Japanese simplicity of yesteryear, Japan's number one auto maker is increasing the Cressida in length, weight, height and width, with luxury and elegance in mind — the message comes through clearly in Cressida's ad copy. The car is described as "The Sumptuous Toyota. Lavish. Extravagant. Uniquely European in Looks."

Leading National Advertisers indicates that six-media totals dropped slightly from 1979 ($48.5 million) to 1980 ($46.9). The most significant change was a shift from net radio to increased expenditures in newspapers: $62,800 in 1979 to $213,500 in 1980. Spot tv spending increased slightly and budgets for net and spot tv were just about equal for the two years.

Volkswagen

The first six months of 1981 didn't look as bright for Volkswagen as the first half of last year. To offset a 17.1% decline in sales reported during the first ten days of July, VW offered dealer cash incentives.

> “
> **Volkswagen's car of the future will combine a diesel engine with other fuel-saving technologies that will get 75 mgp or more in combined city and highway driving.**
> ”

Despite Volkswagen's drop in sales, the company claims it is quietly steaming ahead of GM and Ford in the race to develop efficient high mileage compacts and subcompacts for the mid to late 1980's. Having phased out its Beetle lineup of the 50's and 60's in exchange for improved engineering and styling of the Rabbit in the 70's, the company is now hard at work at the drawing boards on a new aerodynamic four-seater design.

Slated for production some time between 1986 and 1990, VW's car of the future will combine a diesel engine with other fuel-saving technologies that will get 75 mpg or more in combined city and highway driving. Today's Rabbit diesel, with 42 mpg city and 56 mpg highway, is the most fuel-efficient car in production now available in the U.S., far exceeding U.S. standards of 22 mpg for average fuel economy.

The VW Jetta with its rear trunk space, introduced in '81, was the first new VW model that differed in shape from the Rabbit, which continues to be the company's best selling car.

In 1982 Volkswagen will present an up-date version of the Scirocco, and a new model called the Quantum will replace the Dasher.

Although media plans for 1982 were not finalized as of this writing, according to John Slaven, manager, VW marketing, the media breakdown will be 70% net and spot tv, the same as last year, with magazines up 25% (the '81 list of magazines includes over 80 books) and outdoor up 5%. Slaven characterizes the creative for VW as "Advertising with a personality that is unique to Volkswagen." The '81 ad theme was "Volkswagen does it again."

Madeleine Dreyfack

MARKETING & MEDIA Decisions

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Guest Editor Kelly O'Neill, president of Gardner Advertising, St. Louis, stands under famous arch in his home town symbolizing St. Louis's gateway-to-the-west traditions. page 66

New diversity of the family market page 59

Will cultural cable win ad support? page 54

Brand Report 69: Cigarettes page 171

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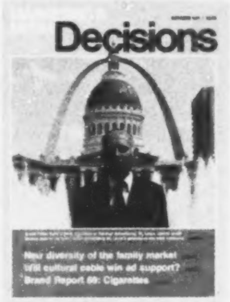
Decisions
New diversity of the family market
Will cultural cable win ad support?
Brand Report 69: Cigarettes

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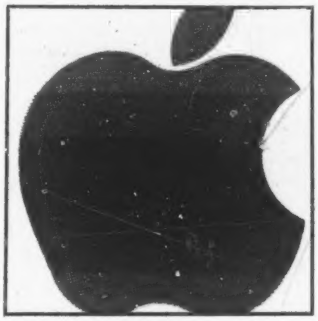

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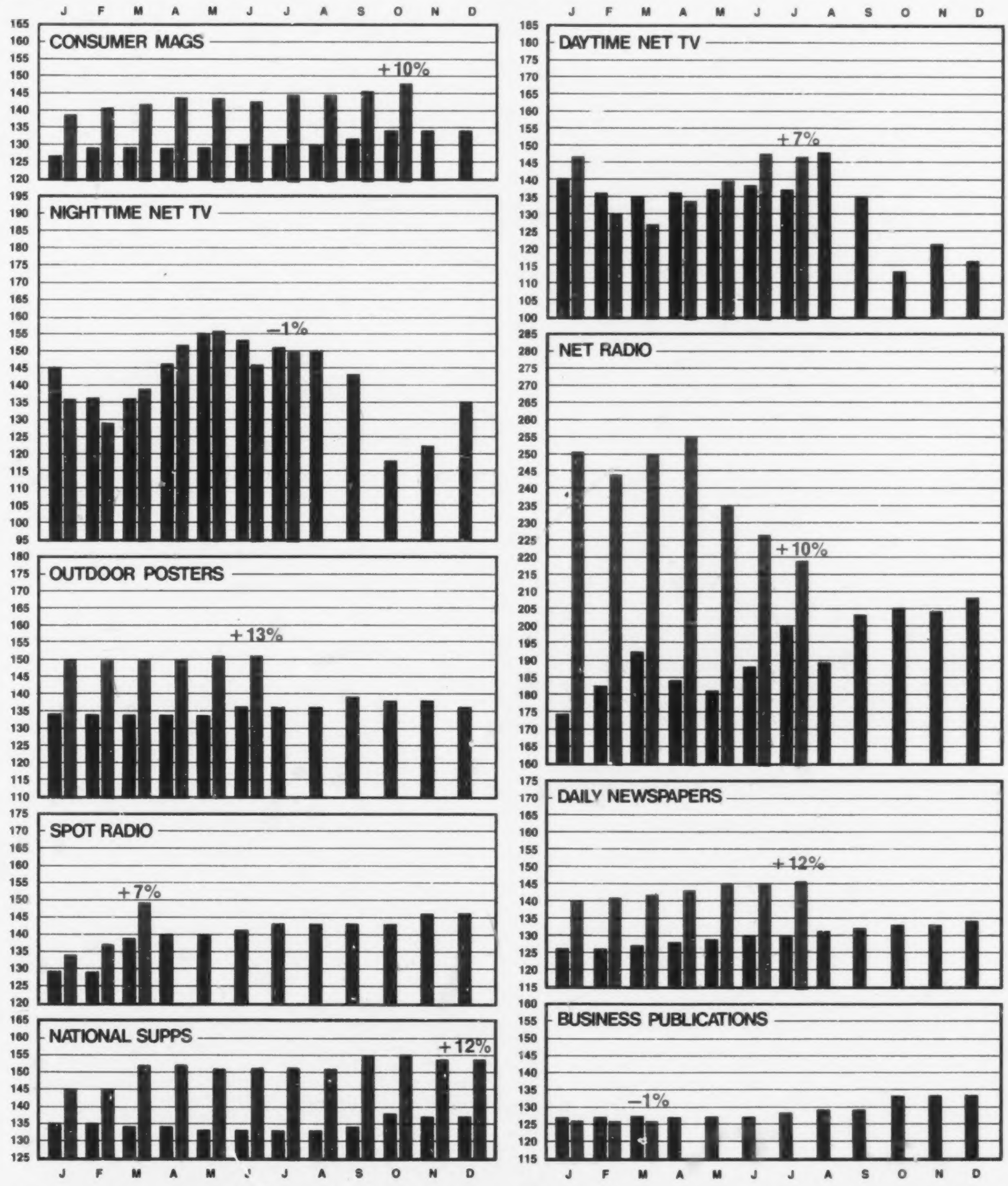
MEDIA COST INDEX

Black bars index for 1980; red bars 1981; base year 1977



The Media Cost Index reflects reported trends extracted from available published sources. This analysis uses standard competitive report sources to develop comparable costs that reflect monthly cost trends by medium. Where industry competitive sources are unavailable, selected cost data from SRDS are sampled. Sources: **Nighttime Network TV** — cost per average 30-second spot 7:30-11 p.m. Monday-Saturday and 7-11 p.m. Sunday from Broadcast Advertisers Report Network TV Service. **Daytime Network TV** — cost per average 30-second spot 10 a.m.-4:30 p.m. Monday Friday from Broadcast Advertisers Report Network TV Service. **Network Radio** — cost per average 30-second radio announcement from Broadcast Advertisers Report Network Radio Service. Index 100 for Nighttime network tv, daytime network tv and network radio are for each month in 1977. **Spot radio** estimates are based on SRDS cost of one minute on one station per market in the top 50 RADI markets. **Consumer magazine** estimate based on reported SRDS cost of page, 4-color in 40 national consumer magazines based revenue, as reported by MPA. **National Supplements** estimates based on reported SRDS cost of page,

COST TRENDS
a Decisions analysis

The Consumer Magazine index has been completely revised with the help of Marv Gropp of the Magazine Advertising Bureau. The index is now based on costs of the top 40 magazines in 1980 in terms of revenue in that year. SRDS listed costs of a 4-color page in these top 40 magazines was established for December 1977 (base for this index).

This was taken as index 100, so the index figures for each month in 1980 (black bars) and the index figures for the months through October 1981 (red bars) indicate increases over the base.

Magazine prices in 1980 rose from index 127 (27% higher than in 1977 in January) to index 134 (34% higher than in 1977 in December).

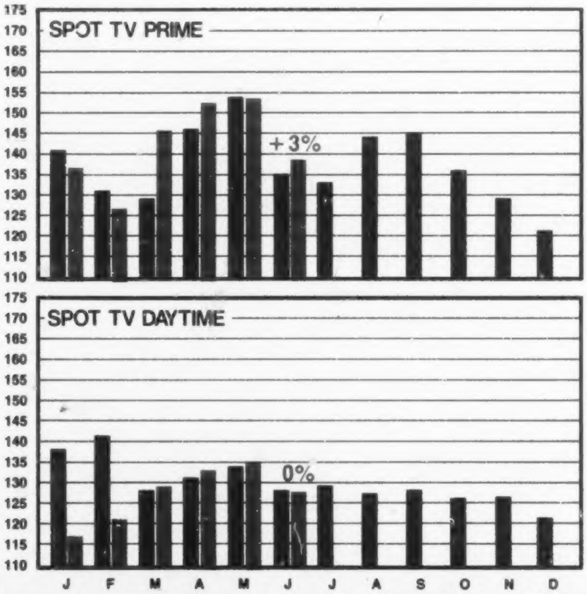
In 1981 prices have continued to rise from index 139 in January to index 148 in most recent month available, October. October 1981 is 10% higher than in October of the previous year.

The magazine price increases are not out of line when compared to what has happened in other major media.

The spot tv index was recently set-up by Broadcast Advertiser Reports to show the difference as well as the trends in spot tv primetime and spot tv daytime. Prime spot started this year at a higher level than daytime spot and has continued to hold that advantage, but compared to last year it is only running 3% ahead. Daytime spot had a relatively poor showing in January and February, but for the most recent month reported, June, had recovered to the extent of matching the year previous in pricing.

Network radio continues to show considerable strength, coming in at index 219 for the most recent month reported, July 1981 (119% over the base year 1977 and 10% ahead of the same month in 1980).

In network tv, daytime is showing more favorable price trends than primetime. In July 1981 prices were up 7% compared to the same month in 1980 for daytime network but down 1% for nighttime network tv in July 1981.



4-color for three national supps. **Daily Newspaper** estimates based on Newspaper Advertising Bureau report of SRDS costs per agate line of a stratified sample of 155 newspapers. **Business Publication** estimates based on reported SRDS cost of a page, 4-color for 48 magazines representing 42 business and professional classifications.

Outdoor Posters based on estimates prepared by F.R. Cawl & Assoc. **HOW TO READ:** Media Cost Index reflects latest available cost compared to base of average year 1977. Percent change reflects annual rate of change and is based on latest available month costs compared to same month in previous year.

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. . . growing faster than Miami and Atlanta. Believe it! There is more than $1.4 billion in commercial construction now under way in the City of Tampa alone. The dynamic Tampa Bay market is comprised of Hillsborough, Pasco and Pinellas Counties. Be sure your print schedules include these powerful newspapers.

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Evening and Sunday

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Source: S&MM Survey of Buying Power, 1980

household significant amounts in the purchasing of goods and services needed for a more comfortable life.

"For the manufacturers represented in the guide, this represents a positive statement of commitment to the black community, which, as a group, spends some $140 billion annually on goods and services."

Predictions are in on 1982's big spenders

Guesstimates on what industries and companies will be the biggest advertising spenders next year are usually fun and sometimes accurate. The latest effort in that area comes from Schonfeld & Associates, a Chicago Research Firm.

According to the 325 page Schonfeld study, pharmaceuticals will be the most heavily advertised product category in 1982. A total of $3.4 billion will be invested by the industry in advertising and promotion. That amount will represent 7.5% of sales, the Schonfeld report predicts.

The biggest advertiser, the report prophecies, will be Procter & Gamble, with an outlay of $806 million, which will represent 5.7% of sales. Following, are the estimated top 10 ad and promotion spending industries, and companies 1982 in box below.

Rebound expected in Leisure time industry

The Favorite passtime of many for the past few years, worrying, is probably headed for the doldrums, if the analysis of Chase Econometrics is correct. The Bala Cynwyd Pa. research company finds indication that the mini-recession for the leisure industry is over.

Dr. Sandra Shaber, consumer economics director at the company said, "Of all discretionary spending, leisure time spending is one of the most sensitive to weak income growth and inflation. In the 1970's, consumer income sustained several shocks. The first was the OPEC oil embargo. Before OPEC quadrupled oil prices in 1974, leisure spending was outpacing general spending by 50% after 1974, the lead dropped to 20%.

"Nevertheless, leisure markets were still in comparatively good shape until 1978 when the Iranian oil cutoff convinced the American public that the energy crisis was real and double digit inflation was here to stay. As a result, the proportion of total consumer spending in real dollars apportioned to leisure dropped from a peak of 14.2% in 1978 to 13.6 last year," she said.

Leisure dollars
(contrast in shares)

	Travel & away	Home centered
1960	70.3%	29.7%
1965	68.1	31.9
1970	65.0	35.0
1975	62.9	37.1
1980	59.9	40.1
1983	58.4	41.6

"Fortunately for many leisure industries, all signs point to a revival in leisure spending. Our forecasts indicate that leisure spending growth is rebounding and will soon outpace total spending the way it did before the bad news Seventies.

"The major reason for the recovery in leisure spending is the massive demographic shift taking place in American households, many of which are becoming smaller, older and richer. The trend to two-income households means more discretionary income, and fewer children per household means more adult leisure time.

"But while the rate of leisure spending relative to total spending is recovering, the distriubtion of the leisure dollar is undergoing a fundamental shift," she said. "One of the most pronounced changes is recent years has been the declining importance of travel and other 'away from home' activities and their replacement by activities centered in the home."

The shift of leisure spent dollars from away from home to in-home activities is shown in the table above.

Continued on page 148

Advertising & promotion big spenders in 1982

Industry	(000 $)	AS % SALES
Drugs	3,464,011	7.6
Retail department stores	3,012,147	2.9
Motor vehicles & car bodies	2,235,764	2.1
Food & kindred products	2,498,463	3.8
Cigarettes	1,762,496	6.1
Petroleum refining	1,494,793	.2
Soap & other detergents	1,443,242	8.3
Chemicals & allied products	1,432,928	1.2
Radio-TV receiving sets	1,275,213	9.4
Retail grocery stores	1,077,211	1.0

Estimated 1982 advertising budgets of largest advertisers

Procter & Gamble Company	806,239	5.7
Sears, Roebuck & Company	771,361	2.2
Ford Motor Company	770,512	2.4
Philip Morris, Inc.	802,493	8.3
General Motors Corporation	552,996	1.0
Bristol-Myers Company	584,086	15.1
Warner-Lambert Company	551,786	13.5
General Foods Corporation	522,591	7.7
R. J. Reynolds Industries	540,678	4.6
Coca-Cola Company	544,716	7.3

"BOOK DIGEST
OFFERS
SOMETHING
SPECIAL:
READERS WHO
READ."

BOOK DIGEST
W. SHAKESPEARE Esq.
Bendell

Book Digest is not a flashy magazine you flip through in ten minutes. The very nature of our magazine preselects an audience that enjoys reading everything from the classics to a modern novel. And that includes reading your ad. It also includes responding to your message. In 1980, Book Digest readers made 231,996 requests for more information from our advertisers using the Reader Response Card.

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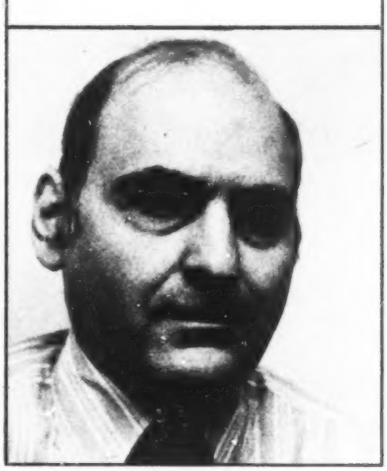
BOOK DIGEST

WHAT THE WELL-READ ARE READING.
WHERE THE WELL-ADVISED ARE ADVERTISING.

*SOURCE: Audits & Surveys June 1980 Subscriber Study.

AS THEY SEE IT

MEDIOLOGY
by ED PAPAZIAN



Viewing by non tv owners: findings and implications

With the controversy over magazine audience levels still bubbling and frothing, it seems unfair not to consider that tv audiences may also be understated, Although the tv diary surveys include provisions to record the viewing patterns of "guests" or "visitors" it is doubtful that this is done as precisely as for household members. And out-of-home viewing, at bars, hotels etc., is a completely unknown factor.

The latest Simmons study does shed some light on this issue, however. Unlike the tv rating services, SMRB measures all households, including those that do not own tv sets, and adults in the latter category *are* represented in its tv diary keeping sample. Thus Simmons produces a record of non-set owners viewing claims by time period, for individual shows, and so on. Obviously their exposure to tv occurs at other people's homes and other out-of-home locations.

According to Simmons, 4.5% of the adult population lives in homes which do not own a tv set (in 1980). Even more interesting are these demographics of these "unfortunates." As shown in Table I, they tend to be young but include quite a few people over the age of 55. Not surprisingly, they are heavily concentrated in small households (1-2 members) and although their educations tend to be a bit beneath the norm, the totals include more then a few adults with college educations.

The most intriguing SMRB findings however, concern the viewing habits of non-tv owners. As demonstrated in Table II, they record just as much viewing as set owners. Indeed, in some day parts they exceed set owners in viewing entries.

Intrigued by this, I began to explore the specific show by show data in SMRB's report. Certain programs seem to be particular favorites. In the daytime for example, 10% of *Password*'s adult viewers live in non-tv homes. *As the World Turns* ranks next with 9%, *Wheel of Fortune* next with 8%, *The Young and the Restless* follows with 7% and so on. In contrast, *The Today Show* and *Good Morning America* are least popular (obviously because one rarely visits someone else's home — even as a domestic, before 9:00 a.m. (in the morning).

In primetime the general preferences seem to run the gammut — from *Sherrif Lobo*, *Vegas*, *Trapper John*, *The Jeffersons*, and *Disney's Wonderful World* on the high side, and shows like *The Love Boat*, *Happy Days*, *Taxi* and some of the primetime movies, on the low side.

The mystery deepens as we explore the "other media" habits of non-tv set owners. Many of them are blacks, so black radio is a particular favorite, and religious radio scores the highest. But AOR/progressive rock formats also

Table I Profile of adults by number of tv sets owned (SMRB 1980)

		OWN		
	Own none	1 set	2 sets	3 + sets
Total	100%	100%	100%	100%
By sex				
Men	47	47	47	51
Women	53	53	53	49
By age				
18-34	46	44	40	34
35-54	21	24	34	44
55 +	33	32	26	22
By H.H. size				
1	20	18	8	2
2	33	38	32	24
3-4	29	30	42	48
5 +	18	14	18	26
By education				
College Grad.	14	12	16	19
1-3 years Coll.	14	16	17	18
H.S. Grad.	33	34	42	43
Not H.S. Grad.	39	38	25	20
% Not Employed	44	44	36	31
(% U.S. population)	(4.5)	(43.6)	(33.2)	(18.7)

draw above par interest as do disco/contemporary stations.

Newspaper readership seems to be well below the norm for people who do not own tv sets and they don't seem to get around much — for they are not well represented in outdoor media's heaviest quintile.

Their tastes in magazines are, perhaps, most interesting. On a relative basis (compared to the national average) *Apartment Life* which is now called *Metropolitan Home*, comes up high along with *Sunset, Rolling Stone, Runner's World, Sports Illustrated, The New Yorker, Omni, Harper's Bazaar* among others.

Data of this sort may not fall in the main stream of tv rating analysis, but it deals with an area that is under-explored, especially for sports and, perhaps in the future, for cable tv. I hope we keep an eye on viewing by "visitors" for this may become a real factor in the early stages of the new electronic media "revolution". ■

Table II Average quarter tv viewing levels by day parts for adults by tv set ownership (SMRB 1980)

		None	1 set	2 sets	3 + sets
M-F	8-10 am	9%	9%	9%	8%
M-F	10 am-1 pm	13	11	11	9
M-F	1-4:30 pm	16	14	13	12
M-F	4:30-7:30 pm	27	26	24	23
M-F	7:30-8:30 pm	35	35	33	31
s/s	8-11 pm	36	38	39	39
M-F	11-11:30	30	30	33	36
M-F	11:30 pm-1 am	11	10	11	12
(% U.S. population)		(4.5)	(43.6)	(33.2)	(18.7)

OUT-OF-HOME
by PETE RIORDAN
manager, OHM Group,
BBDO, New York

Judgment from Babel

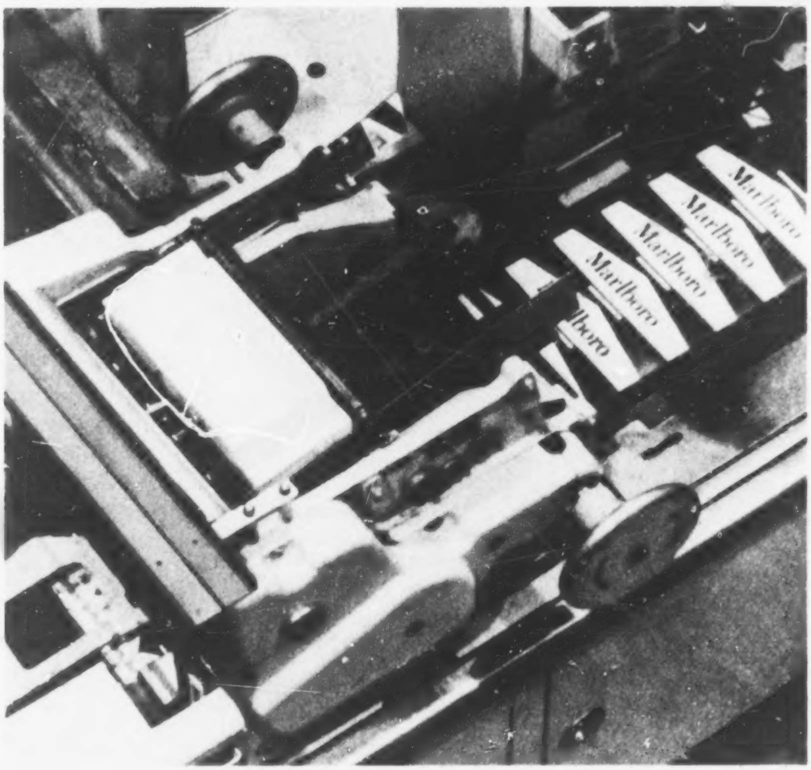
The second of July, 1981, loomed like Judgment Day for the outdoor media.

On that date, the U.S. Supreme Court handed down their long-waited Metromedia vs. San Diego opinion, the first ever rendered concerning a government's power to prohibit all outdoor signs within its jurisdiction.

This was a case that had the outdoor industry and advertisers holding their breath for a long time. All of the parties were acutely aware that Supreme Court judgments are often definitive, frequently upredictable and always unappealable.

This inherent finality caused great trembling, particularly since the Justices seemed to have decided to hear the outdoor appeal in order to establish a general Constitutional principle. Not only would that set a precedent for pending lower court decisions, but it was expected to be carefully watched by states and municipalities planning to enact their own restrictions.

At issue was the City of San Diego's 1972 ordinance requiring the removal of all but "on-premise" advertising structures (defined as those displaying goods or services available at the site of the sign) within its limits. No compensation was provided for the 1,300 30-sheet posters and painted bulletins that the two "off - premise" sign companies - Foster Kleiser and Pacific Outdoor Advertising would lose.



Brand Report 69:

Cigarettes

The cigarette industry showed signs of becoming a two company battle for supremacy in 1981, as Philip Morris trailed longtime leader R. J. Reynolds by only one percentage point. RJR continues to back established brands heavily while Philip Morris launches more new products. Behind them, only Lorillard was able to make a gain. And after two years of heavy media spending, the industry has slowed its budget hikes to no more than keep pace with inflation in media dollars — except where new brands are involved.

Cigarettes are on the move again. A surprising first half in 1981 places cigarette growth at just over 3%, but much of this activity is attributed to new brand introductions, spin-offs, and pre-tax inventory buildup. The second half may show growth back at about 1%, but some observers are hopeful that the market is in a rebound phase.

The new confidence felt by the industry is best exemplified by the ads currently being run by The Tobacco Institute. They challenge the claims of potential health hazzards created by cigarette smoke for non smokers.

But while sales are getting a new lease on life, advertising slowed down last year after three years of new brand and spin-off intros. Media expenditures increased by 5% last year, less than the media inflation rate and considerably under the 27% increase in 1979 and the 11% increase in 1978.

In the first half of 1981, an unprecedented 17 new brands or spin-offs were tried out, while total media expenditures for the period increased only 8% barely keeping pace with rises in print media pricing. The money was concentrated on new brand introductions; spending for established brands has been reduced.

Other factors influencing the market this year include the levelling off of share loss by non-filtered and full flavor brands. Both Winston and Marlboro did well in the first half, while the ultra-low tar area is becoming increasingly crowded with new contenders. At mid-year, Brown & Williamson's heavily financed Barclay held a 1.1% share, an expensive victory for B&W.

Much like the brewing industry, cigarettes are gradually becoming a two company industry. While over the past 10 years, R.J. Reynolds has increased its share of the business a scant 1% to 32.7%, Philip Morris has expanded its share from 16.5% to 31.7%. During that decade, American Brands share fell from 19.6% to 10.8%, Brown & Williamson's shrank from 16.7% to 13.7%. What was once the Liggett Group just about disappeared, sinking from a 6.8% to a 2.3% share. Among the smaller cigarette companies, only Lorillard expanded its share, from 8.7% to 9.7%.

Philip Morris was able to hold its top brand lead with Marlboro over second place Winston (R.J. Reynolds). Marlboro commands a 17.7% share and Winston a 13.2% share. RJR has three other brands in the top 10, Salem, Camel and Vantage. Philip Morris has two, Benson & Hedges and Merit. The top 10 brands hold 73.7% of the market.

Brown & Williamson, American Brands and Lorillard each have one brand in the top 10, Kool: Pall Mall, and Kent, respectively.

The move of smokers from full flavor to low tar, high filtration brands continues. Low tar brands now account for 48% of all cigarettes sold in the U.S. The increase in low tar cigarette sales is expected to continue.

Low tar share of the market has expanded continuously since 1976, when it held only a 17% share of all cigarettes sold in the U.S.

Most new brands put into test market are in the low tar category, but the menthol segment, dominated by Kool, continues to be an attractive market that few have been able to successfully enter. Even Brown & Williamson was unable to succeed in flying Alpine in tandem with its own Kool brand. Other Brands are attempting menthol spin-offs, mostly with limited success.

The menthol segment accounts for about 28% of U.S. cigarette sales.

As 1981 reaches the final quarter, the industry's position is stronger than it has been in several years. After its initial newspaper blitz against the studies of non-smoking Japanese women who were married to smokers, the Tobacco Institute ran reminder ads, prepared by Marsteller, in magazines.

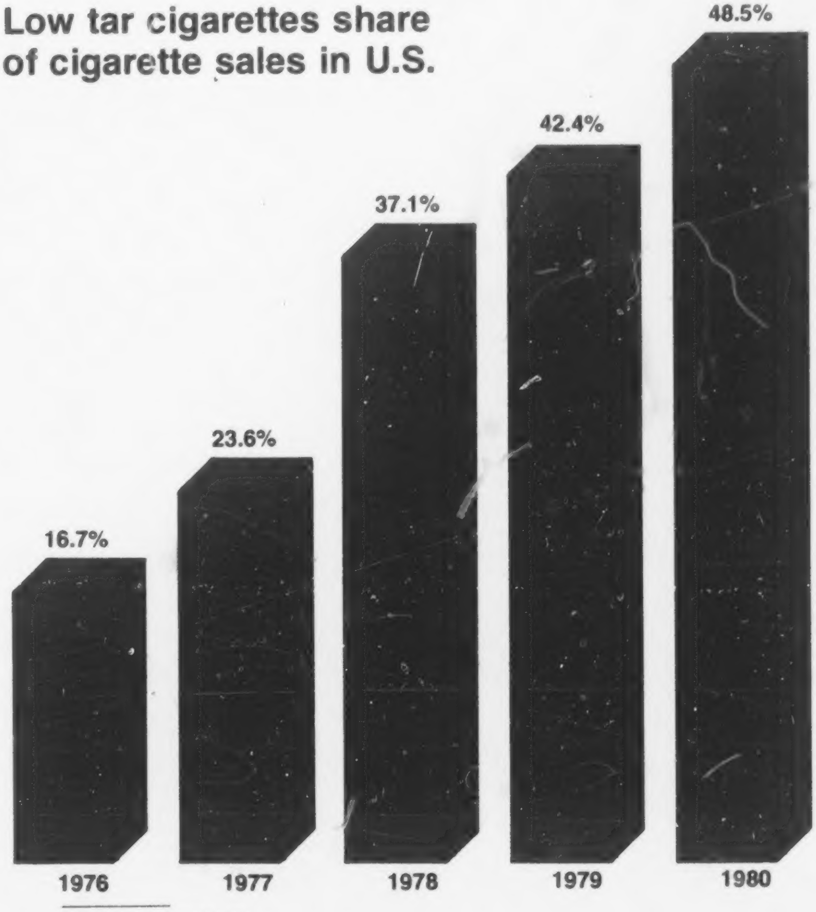
The institute plans to address controversial issues as they arise, in print media.

Samuel D. Chilcote, Jr., president of the association of cigarette manufacturers, said the Japanese nonsmoking wives study is the first topic in a nationwide series of newpaper and magazine advertisements. "A single day's news coverage of the problems with this study's conclusions simply isn't enough to erase the questionable impressions it left in the U.S. public's mind."

The ads show the industry in its first aggressive public posture in some years, and in a mood to challenge controversial areas in the public health debate.

On the basis of that and continued

Low tar cigarettes share of cigarette sales in U.S.



Source: The Tobacco Institute.

1980 media expenditures for leading cigarette brands

Brand	Total	Magazines	Supps	Outdoor	Newspapers	Parent company
Carlton	$30,441,100	$13,579,500	—	$ 6,170,400	$10,691,200	American Brands
Barclay*	5,173,500	3,576,200	—	473,300	1,124,000	Brown & Williamson
Kool	32,978,500	11,819,300	$3,766,000	12,382,400	5,010,800	Brown & Williamson
Kent	58,721,700	15,374,200	5,753,200	9,096,600	28,497,700	Lorillard
Triumph	23,708,700	7,839,000	2,567,000	2,633,600	10,669,100	Lorillard
Benson & Hedges	30,763,000	15,640,900	3,260,300	5,264,400	6,597,400	Philip Morris
Cambridge	30,117,300	11,146,100	500,400	2,002,800	16,468,000	Philip Morris
Marlboro	46,019,100	16,423,500	2,358,100	9,909,500	17,328,000	Philip Morris
Merit	56,640,600	14,120,400	6,372,400	7,006,800	29,141,000	Philip Morris
Virginia Slims	21,076,600	12,089,800	747,400	4,801,200	3,438,200	Philip Morris
Camel	30,393,100	13,300,900	289,700	7,851,000	8,951,500	R. J. Reynolds
Now	49,814,000	17,010,400	4,974,000	5,904,100	21,925,500	R. J. Reynolds
Salem	69,210,800	22,712,500	4,580,300	9,684,000	32,234,000	R. J. Reynolds
Vantage	59,419,200	22,964,700	7,142,500	2,132,400	27,179,600	R. J. Reynolds
Winston	47,991,700	23,727,600	—	12,787,900	11,476,200	R. J. Reynolds

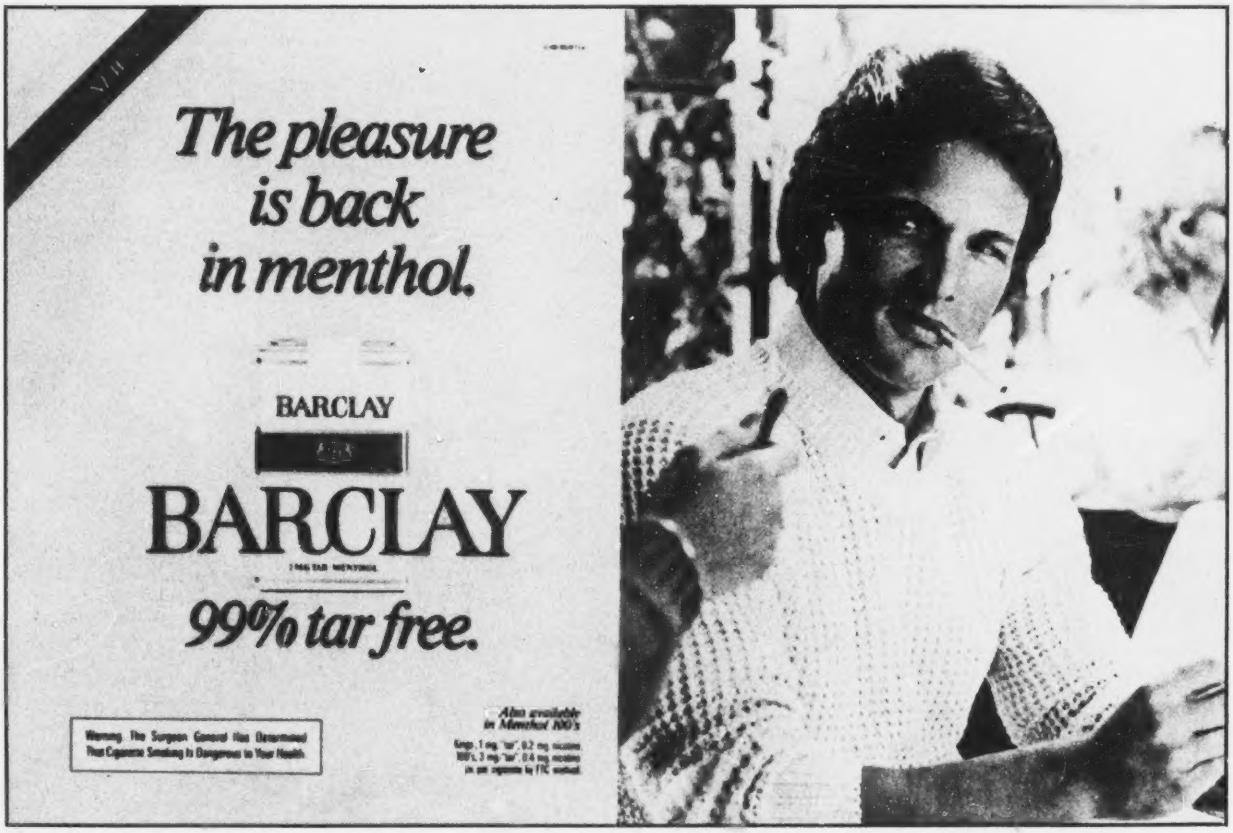
Source: Leading National Advertisers, Media Records. * Barclay on the market in only last three months of 1980.

new brand activity, the last quarter of 1981 will remain strong for cigarette advertisers. Here's what the top spending brands are doing on an individual basis.

American Brands

Except for Carlton, share erosion is the primary pattern for American Brands. Even its top selling straight cigarette, Pall Mall, is gradually losing share, but still has enough momentum to hold the the fifth place among the top 10 brands.

While Carlton edges ahead, Tareyton, Silva Thins, Tall, and Lucky


The pleasure is back in menthol.
BARCLAY
BARCLAY
99% tar free.
Warning: The Surgeon General Has Determined That Cigarette Smoking Is Dangerous to Your Health.
Also available in Menthol 100's

Barclay brings imagery to the low tar category with graphics featuring up-scale people who are confident.

Strike are all gradually sliding. American Brands hasn't sucessfully introducted a new product since Tall, launched in 1976.

Primary new product efforts have been entirely directed to Carlton, which most recently has been spun off in a 120mm. version — an ironic move since the 120mm. size group has been flat since plateauing in 1977.

Maryland was tested in 1980, but hasn't yet emerged. The company declined to comment on whether the brand is still being tested or has been shelved.

Carlton gets the largest share of AB's cigarette money. It took $30,441,100 last year, with magazines receiving the largest slice.

Advertising for Carlton continues to stress its low tar and nicotine content, and the relatively benign effects such low tar and low nicotine content have on personal health. Creative is statistical in its tone, using information rather than mood conveying graphics to make its point. Newspaper and magazine ads are usually two color, red and black with headlines and lists of numbers.

Positioning in newspapers continues to be a strong ploy for Carlton, with fractionals often appearing on back pages in tabloids and on sports pages and other pages of entertainment interest.

Spending for Pall Mall is about 60% lower than Carlton in magazines, and about 80% less in newspapers.

Tareyton expenditures are in the $11 million range, with 80% of that invested in magazines.

Brown & Williamson

The brightest spot in this company's performance in 1981 is its new brand, Barclay. But it is a success that is costing a fortune.

B&W's flagship brand Kool, continues to hold the number three spot in sales, selling about half as many cigarettes as the industry leader, Marlboro. But like the other B&W brands, Kool is gradually losing market share.

To stem its losses, B&W introduced a low-tar Kool Ultras in selected trading areas. It comes in two sizes, kings and 100 mm. The filter used for Barclay is also used in Ultras.

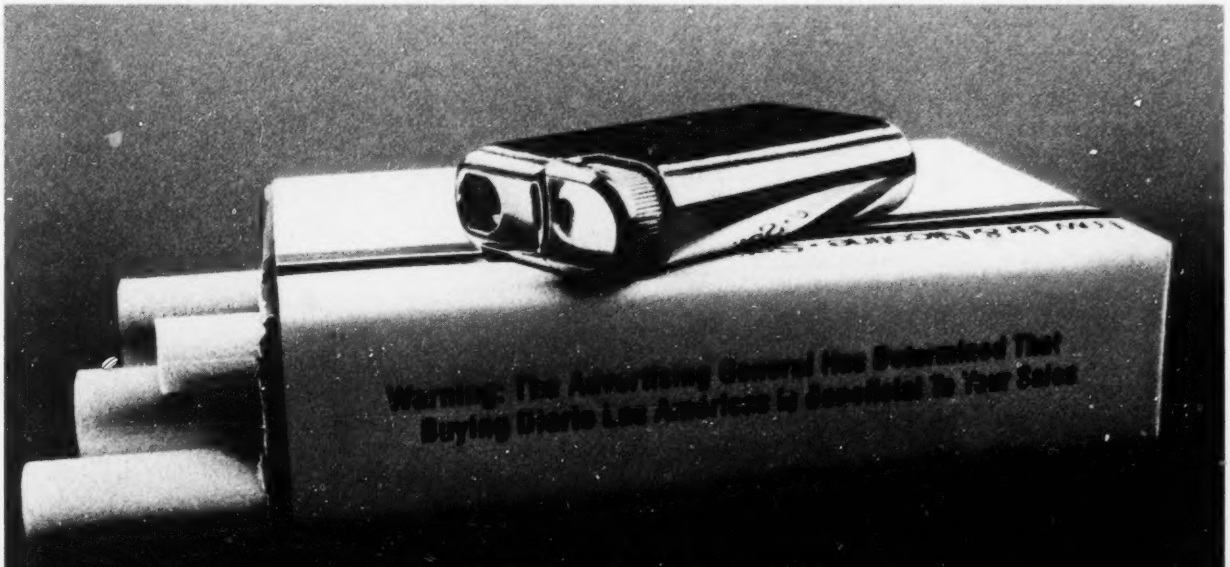
B&W is counting heavily on the continued expansion of the low tar, high filtration market with its investment in Barclay. Industry estimates suggest that its first year investment for Barclay is about $150 million. Much of that is in promotion, sampling and give-aways.

Barclay's media focus is in magazines, where four-color spreads and gate folds are ubiquitous. The message is sharply up-scale: an elegantly dressed man or woman extends a light to an unseen second party. Copy announces, "The pleasure is back."

B&W's saturation methods have won the brand a 1.1% brand share, better than Philip Morris' Cambridge in its first year, but not as good PM's Merit introduction.

B&W's elegant redesign of package for Viceroy hasn't done much to improve the brand's performance. Brand share erosion continues unabated.

With Kool Ultra and Barclay Menthol going to market this summer, B&W is now largely committed to expanding its established brands. It must be a relief for management at B&W to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Diario
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The Spanish-language Daily Newspaper • Founded July 4, 1953

have Barclay established after its trials and miscalculations with the low tar brand Fact, which expired after two unsuccessful launches.

Lorillard

The new vitality for Lorillard has come in come unexpected areas.

A strong first half performance by Newport is pulling it up to nearly a 2% share, which has been strengthened by the recent introduction of non-menthol Newport Red.

Kent has continued in gradual sales increases since a dip in 1978, while Golden Lights appear to have crested in 1978, and have been slipping since.

Low tar True has also been on a slight decline, while last year's new product, Triumph, survived an ad copy controversy to establish a 0.4% share. First half data shows the brand is still building.

On the basis of this encouraging news, Lorillard is making some bold new product moves. Bistro, a flavorful low tar with an art deco package went into test in Sacramento in August.

Maverick, another flavorful low tar aimed at women, has been in test since late May in Lubock, Texas, and Spokane, Washington. This new brand could be the Marlboro package in drag. Copy proclaims, "Now there's a whole new breed. Maverick. Untamed taste in low tar."

The package is classically simple in design for both 100s and kings. But the graphics tell a different story. They depict a fulsome cowgirl in denim and chaps with saddle slung over her shoulder, and thumb cocked in western belt in a provocatively masculine pose. Clearly, this is the Marlboro girl.

Since Philip Morris hasn't tried to market a feminine style Marlboro Lorillard has stolen a march and could well establish an outdoor, western, tough but appealing image that might work with some female smokers.

Maverick is handled by Dancer Fitzgerald Sample.

The other new cigarette, Bistro, is a drastic departure from current concepts in package design, which recently has moved in the direction of classic simplicity. Bistro's art deco design has definite artsy, Bohemian overtones.

Such distinctive packaging will definitely make a statement about smokers who choose Bistro as their brand.

Lorillard believes it can get a true reading from its Sacramento test market, as there is little media spill-over into adjacent areas. All available media are being used in the market.

Whether or not these brands find a niche, Lorillard must be credited with a highly imaginative approach to new brand concepts, which it calls "market probes."

Distinctive graphics are also playing a role in the company's established brands. Kent III uses the package in food display graphics to establish the concept of flavor. And a new campaign for True, Lorillard's ultra low tar brand, makes a game of finding the True Symbol, the filter shape in a blue circle, among circles of other color, on beach chairs, sails, and playing cards. The copy reads, "you found it."

Sarah Ridgeway, public relations director at Lorillard said, "The playback from focus groups is, 'yes, we tried them all, and True is our cigarette. 'It

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SOUTHWEST

The Houston Post
Drawing to determine ballot

★ Houston's Growth Newspaper
17,718 Increase Daily
15,307 Increase Saturday
24,455 Increase Sunday
★ Higher Daily Readership
62% Share
★ More Upper Income Readers ($35,000 or More)
63% Share
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63% Share
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70% Share

The Houston Post
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Houston, Texas 77001
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Represented Nationally by Branham Newspaper Sales
Houston Market Study, 1981
by Research Information Center, Inc. (RICI)

Computed by The Houston Post Research Department from ABC FAS FAX March 31, 1981

JACKSONVILLE
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A MARKET THAT WORKS

Looking for a hot Sun Belt Market? Jacksonville is the market that works. Over a five-day period our Jacksonville papers reach 375,000 adult readers in the five-county SMSA. That's about three-fourths of all adults in the market. Sunday audience increases to reach about eight out of ten adults. Our penetration tops any other major metropolitan market in Florida. Add the St. Augustine Record and you've got a red-hot market that works!

Sources: Circulation '80-81; Belden CMS, '80

Florida Publishing Company

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Jacksonville Journal, evenings
Times-Union Journal, weekends
St. Augustine Record, evenings

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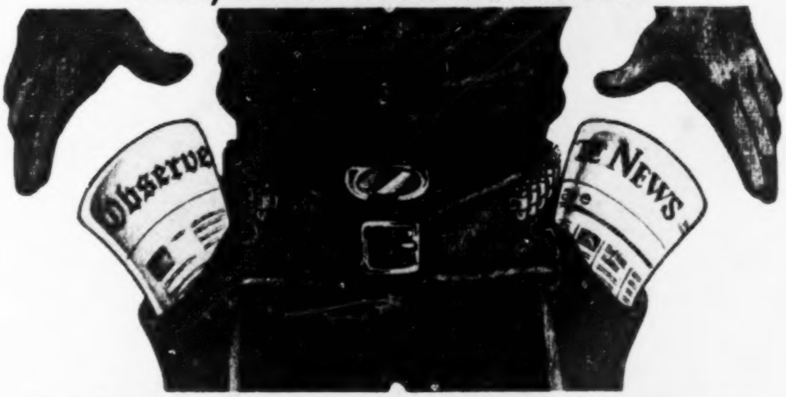
Phone (904) 359-4350

Represented nationally by Branham Newspaper Sales

WHATEVER AUDIENCE YOU'RE SHOOTING FOR, GO WITH THE BIG GUNS



The simple truth of the matter is this:

No matter what audience, what demographics, what market group you're trying to reach in the Carolinas, the big guns in this active marketplace are The Charlotte Observer and The Charlotte News.

No other media comes close to reaching the over $15,000 and over $20,000 income groups as effectively and in as much depth as these two newspapers. Or as economically.

And with an area unemployment rate that's barely half the national average, it's a stable, consistent market as well.

For all the facts, figures, demographics and information on Charlotte, its SMSA, and ADI market areas, contact Gene Williams, Advertising Director.

He'll show you how to hire the biggest guns in the territory without blowing your bankroll.

THE CHARLOTTE NEWS
The Charlotte Observer
Post Office Box 32188, Charlotte, N.C. 28232. 704/379-6900

also keeps people on the lookout for the next cute thing we're going to do."

The surprise of the season, she said, has been the steadily improving performance of Newport, a menthol brand, and its new non-menthol spin-off, Newport Red. Ms. Ridgeway commented, "Our research shows that menthol smokers like to switch off to a non-menthol, say on weekends, and Newport smokers had no place to go. Indications are that Red is going gangbusters."

Copy for Newport says "Alive with pleasure" and depicts young adults frolicking in frivolous fun activities, to build the association. Spending in 1979 and 1980 has been in the $25 million range according to Leading National Advertisers and Media Records.

For the first half of the year, Newport was up 33% according to the mid year Maxwell Report

An interesting ploy Triumph has been using a bordered television highlight schedule in community newspapers (see Decisions, September, page 66).

Kent, and its Golden Lights spin-off, continues to get the largest share of Lorillard's media dollars while accounting for about 48% of the total domestic Lorillard volume. It remains as the company's flagship brand and probably will for several more years.

Philip Morris

The most successful cigarette company in the past decade gives no sign of slowing down. Mid-year Maxwell Reports shows PM with just one percent less of the cigarette business than R.J. Reynolds.

All the major PM brands showed volume increases for the first six months. Only Alpine, Saratoga and Parliament were laggards.

The flagship brand, Marlboro continued to build its lead over previous leader Winston. Spending last year changed focus as newspapers and magazines got nearly equal amounts. Overall, spending for the brand was up $6.5 million to $45,010,100. Outdoor was given a substantial budget boost last year.

But the major recipient of media dollars was Merit, the trail blazing low tar that had built up to a 4.3% share by mid-year. Expenditures were up $4 million over 1979, with the additional cash going to outdoor and newspapers.

Cambridge, PM's ultra low tar, managed four tenths of a point at mid-year as PM continued a heavy media investment in potential longterm growth. The 1980 introduction was backed with $30.1 million in measured media, the largest share of it in newspapers.

Cambridge continues to use a stark creative design in its advertising, just the package and the statement: "The lowest tar of all." It is low profile advertising offering no hooks for personal identification with the brand. Package and advertising appear to be cast more in the European than the American mode.

Benson & Hedges, PM's good time brand, is neck-and-neck in a race with Newport. Expenditures climbed past $30 million, up $2.2 million over 1979. The new money was mostly invested in newspapers.

On the test market front, PM has a cool smoking non-menthol brand, Northwind, under consumer scrutiny. The menthol category has been exceedingly hard to crack in recent years.

The new cigarette, using what it calls "Chill Blend" instead of menthol, has 8 mm. of tar in king size.

Northwind is in test in Houston, Cleveland and St. Louis. It was introduced in mid-July. All available media are being used including ROP newspapers.

Creative features the picture of a polar bear in spreads and four-color single pages. Copy states: "Suddenly, a new cigarette that cools without menthol . . . cools like no menthol cigarette can." Creative utilizes a light blue, dark blue and grey.

The package is dark blue and grey and omits the polar bear.

Bob Tracey, public relations director for Philip Morris commented: "The sell-in has gone well, and we've had phenomenal feedback from tast test focus goups. You expect a brand spin-off to go well, but Northwind has started exceptionally well for being free standing. Of course, the Philip Morris name helps."

Northwind could be the first new successful entry in the menthol type category in recent years.

R.J. Reynolds

After a reorganization of its advertising and media planning, RJR has gone into battle with Philip Morris to hold pre-eminence in the cigarette market, with vehemence.

The gradual slide of Winston is apparently being accepted while RJR has chosen to expend unprecedented amounts on brands that are showing some sales momentum; namely, Salem, Vantage, and NOW.

Spending for Winston dropped dramatically, from $55.5 million in 1979 to $48 million last year. But Salem was up $25 million from $44.5 million. But the most astonishing leap was for the ultra low-tar, NOW, which went from $16.2 million to $49.8 million last year, an unusually large investment in a brand that as of the first of July had only seven-tenths of one percent of the market.

Late last fall, RJR announced it was putting more emphasis on newspapers and reducing its magazine list. But spending in magazines didn't decline. Rather, increased funds were made available for newspapers.

NOW's newspaper budget went from $6.8 million to $21.9 million, Salem from $19 million to $32 million, and Vantage from $18.5 million to $27.2 million.

There was no new brand test activity by RJR last year. Apparently, the company concluded it was better to invest more in its on-going brands than risk another expensive failure such as Real, which at its peak had as large a brand share as is now enjoyed by NOW.

Positioning remained constant with most RJR brands. Winston retained its appeal to hard working blokes in hard hats and stocking caps, while Salem continued its association with mountains and pine forests, especially in full page newspaper spreads that almost cried out to be colored-in, child's coloring book fashion.

But far and away, RJR's most phenomenal success has been the resurgence of the Camel brand. As late as 1977, the one time top RJR brand held only 1% of the market. This year

DID YOU KNOW...

that men in the north central states are 12% above the national average in heavy cigarette consumption?

To light up all the facts about the exact geographic, demographic and lifestyle characteristics and media habits of consumers of over 500 American products and services...consult

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it is up to 2.5%. Much of that strength has come from the introduction of Camel lights, and a package redesign that brings it back in line with the celebrated original Camel pack.

Ironically, Camel expenditures in measured media were reduced about 3%. Spending in supps was trimmed from over $5 million in 1979 to under $300,000 last year. Those redispersed supp funds were about evenly divided between newspapers, magazines and outdoor.

Copy for the brand is blatantly macho, proclaiming: "Where a man belongs." Graphics depict manly sporting situations.

The most questionable move by RJR is the repositioning of NOW, from upscale female business executive to a broader ultra low-tar demographic. Unless the brand develops more momentum that it exhibited in the first six months of the year, RJR can hardly continue to back it with a nearly $50 million annual budget.

While the Winston campaign remains heavily blue collar, RJR is taking an innovative approach toward magazine space. Its agency, William Esty, has prepared magazine spreads ads in "L" and "U" shape configurations, of one and one quarter and one and one half pages, respectively.

Harry Lees, Winston group brand manager said: "We find that the reader's eye is so used to full page and double page ads, this particular unit is successful because it is so different and eye catching. It's never been used nationally before, The ads are appearing in major metro market newspapers and about 25 magazines."

Martin Orlowsky, director of marketing services, R.J. Reynolds Tobacco Co., takes an optimistic view of Reynolds position in the cigarette business, despite challenges from Phlip Morris. He notes that Winston's brand share has stabilized with the introduction of Winston Ultra, and that the introduction of Salem's Ultra has moved it into the number three position, displacing Brown & Williamson's Kool brand.

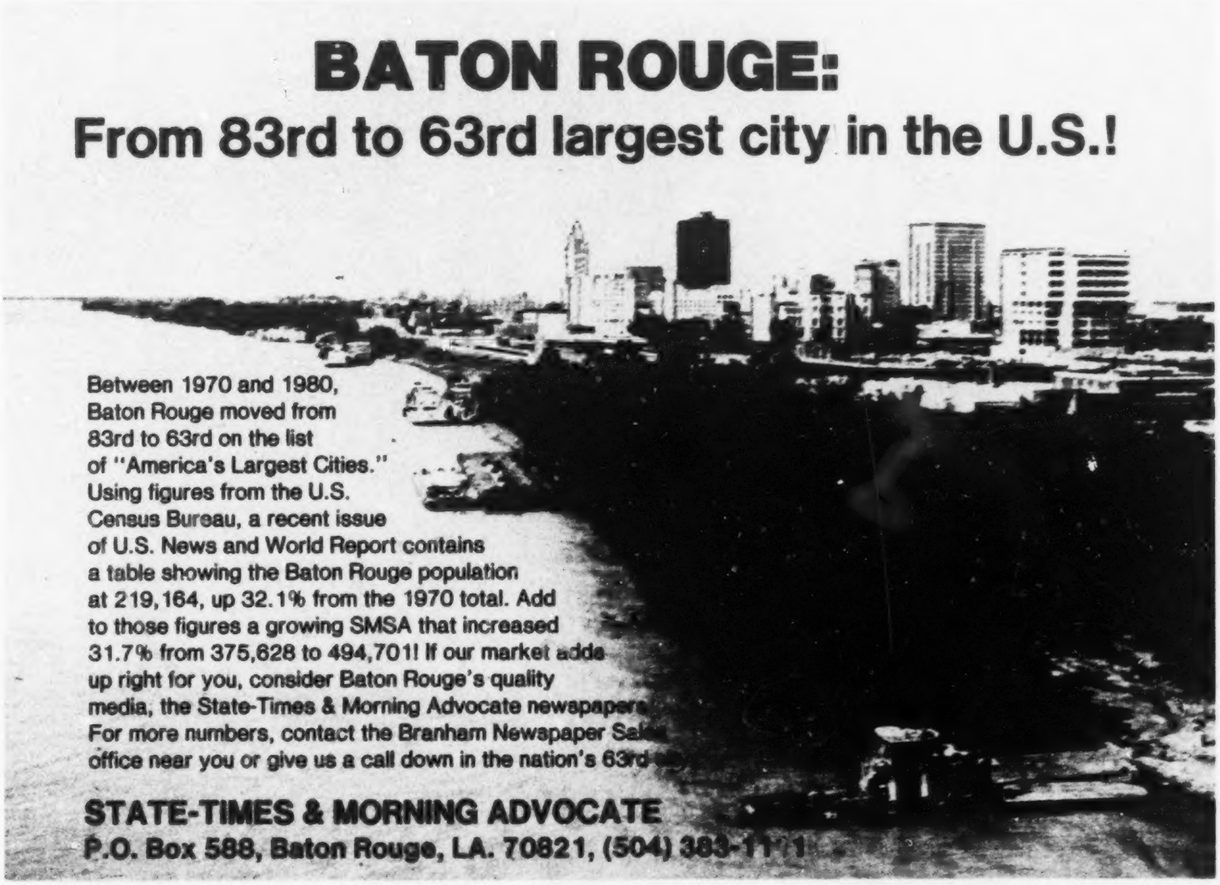
The heavy expenditures for the very low tar NOW, he said, stem from a repositioning, "We felt that previously, NOW wasn't positioned to benefit from the long term expansion of the low tar category. We have tried to make it more competitive, not just for this year, but for long term growth.

Another RJR brand that has been redressed and put into extension is More. Previously it was offered in just the 120 mm version. In July the 100 mm light version was introduced, in a beige pack. The wrapper for the cigarette itself is also in beige, in contrast to the dark wrapper for the 120 mm version.

The brand extension, Orlowsky said, "is positioned against the female market, designed to appeal of the active woman of the 1980's."

Grand Metropolitan Ltd.

What were once the Liggett brands, a subsidiary of the Liggett Group, were sold last year to Grand Metropolitan Ltd. The four surviving brands that receive advertising are Decade, Eve, L&M, and Lark. But that other grand



BATON ROUGE:
From 83rd to 63rd largest city in the U.S.!

Between 1970 and 1980, Baton Rouge moved from 83rd to 63rd on the list of "America's Largest Cities." Using figures from the U.S. Census Bureau, a recent issue of U.S. News and World Report contains a table showing the Baton Rouge population at 219,164, up 32.1% from the 1970 total. Add to those figures a growing SMSA that increased 31.7% from 375,628 to 494,701! If our market adds up right for you, consider Baton Rouge's quality media; the State-Times & Morning Advocate newapapers For more numbers, contact the Branham Newapaper Sal office near you or give us a call down in the nation's 63rd

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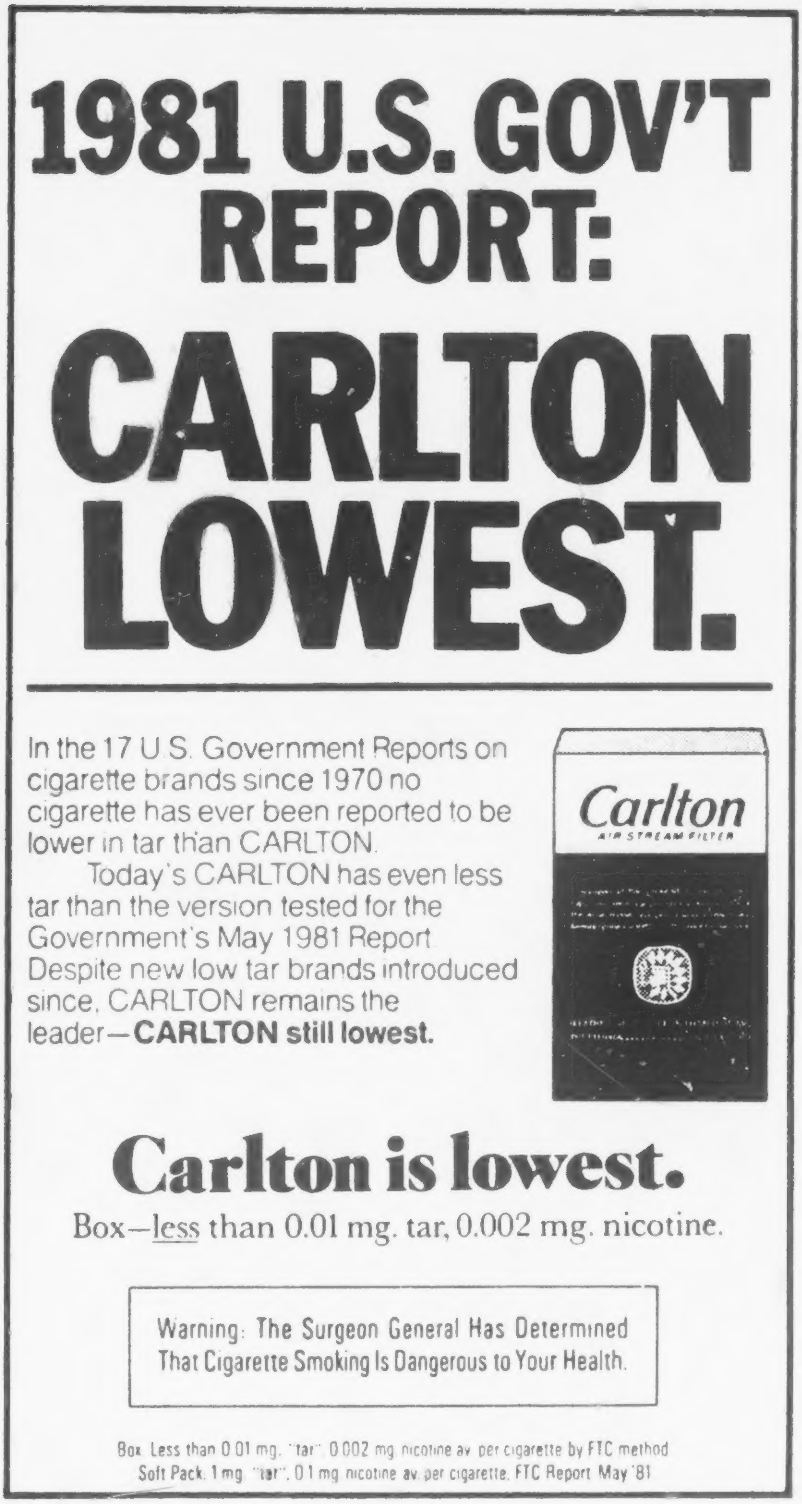

1981 U.S. GOV'T REPORT: CARLTON LOWEST.

In the 17 U.S. Government Reports on cigarette brands since 1970 no cigarette has ever been reported to be lower in tar than CARLTON.

Today's CARLTON has even less tar than the version tested for the Government's May 1981 Report. Despite new low tar brands introduced since, CARLTON remains the leader—**CARLTON still lowest.**

Carlton
AIR STREAM FILTER

Carlton is lowest.

Box—less than 0.01 mg. tar, 0.002 mg. nicotine.

Warning: The Surgeon General Has Determined That Cigarette Smoking Is Dangerous to Your Health.

Box: Less than 0.01 mg. "tar", 0.002 mg. nicotine av. per cigarette by FTC method.
Soft Pack: 1 mg. "tar", 0.1 mg. nicotine av. per cigarette, FTC Report May '81.

◀ **Carlton uses fractionals** scattered in strategic pages in newspapers to achieve a high level of frequency and high visibility.

old L&M brand, Chesterfield, has not been advertised since 1977.

It has been a sad story for this group of brands over the past 10 years, as its collective share slid down to a 2.3% of the U.S. market from 6.9% in 1970. Currently, the company holds a share that is smaller than that held by Camel.

Once the sale of the brands was accomplished advertising budgets cut by nearly 90%, from $12,783,700 in 1979 to $1,304,000 last year. None of the four brands received as much as $1 million, but such as the expenditures were, L&M got the largest share.

Ironically, of the five brands, only Chesterfield has stabilized, with less than a one tenth % of the market. But for the past two years, sales have consistently held at fifty million units.

Observers of the cigarette business must wonder what could be done with Chesterfield by a well financed marketer with a willingness to make a commitment to a revival. Reynolds' success with Camel, bringing the dormant brand back from a 1% share to a 2.5 shows that a once successful brand need not be consigned to the scrap heap. And the fact that Chesterfield retains a hard core group of dedicated smokers despite a lack of advertising for over four years should provide some hope for a possible turn-around.

But one brand in the group that may well not survive is Decade, introduced in the mid 1970's, when the low-tar explosion began. Despite an original conception in imagery and graphics, the brand never took hold, and last year slipped to less than one tenth % share, as sales fell from 114 million units to 30 million.

At current rates of sales errosion, the group will be down to about a 1.7% share of the market in another five years, and may well not exist as national brands, but be sold only where pockets of regional interest continue to justify a presence in the marketplace.

Conclusions

Brand extensions will probably get most of the introductory activity in the next 18 months, as the companies jockey for position in the low tar category, in which growth is continuing.

Back in 1973, before the development of low tar cigarettes which still had some flavor, cigarette marketers were hard pressed to successfully launch a new brand without television. New product attributes were needed to get attention. The development of the 120 mm. cigarette broke the stalemate.

But gradually, the cigarette market is heading back to the state of affairs that prevailed in the early 1970's. As low tars saturate the market, the opportunity to talk about new product attributes declines. *Fred Gardner*